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ABSTRACT

This report documents an application of the Preparing Educational Training Consultants (PETC) systems to the training of a cadre of internal organizational specialists, presenting its analysis in five chapters dealing with (1) a description of the systems, the context and focus of the study and major questions guiding the evaluation; (2) a history and background of the cadre; (3) a documentation of training intervention by the Northwest Regional Educational Laboratory (NWREL); (4) training outcomes; and (5) conclusions and recommendations. Designed by NWREL to provide educators with practical skills and knowledge for organizational development and planned change, PETC trains small groups of educators within a school system to be able to provide help in (1) training in group process skills (PETC I); (2) consulting in a temporary relationship (PETC II); and (3) long-term organizational training and consultation (PETC III). Upon completing the program, participants are expected to be able to diagnose training needs in process skills, provide training activities to meet those needs, strengthen weak organizational functions, and facilitate normative and structural changes in the organization to improve overall effectiveness. Tables and appendixes are included. (MB)

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THE TRAINING OF A CADRE: AN APPLICATION OF THE PETC SYSTEMS

Improving Teaching Competencies Program

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December 1976

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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CHAPTER 1: PURPOSE OF THE STUDY

The basic purpose of the Improving Teaching Competencies Program of the Northwest Regional Educational Laboratory (NWREL) is to develop a set of instructional systems that will provide educators with competencies (knowledge, skills and activities) to manage more effectively the human component of school organizations.

All the instructional systems from the Program are designed to equip educational personnel with knowledge, attitudes and skills to do specific tasks. Most are designed to be used as a focus for workshop training and require the active involvement of participants. The systems are intended to help educators learn to perform tasks related to group or organizational maintenance activities rather than specific instructional tasks. That is, instead of learning specific techniques for providing math or reading instruction, educators learn how to manage certain organizational activities such as planning, problem solving and working with others. These are functions which serve to maintain the school in relationship to its environment and serve to maintain and enhance the coherence and effectiveness of the classroom group and/or school organization.

This report examines the use of these instructional systems with a group of educators. Specifically, the report documents an application of the Preparing Educational Training Consultants (PETC) systems to the training and preparation of a cadre of internal organizational specialists. In this chapter we describe the PETC systems, the context and focus of the study and the major questions that guided the evaluation activities. The remaining chapters are organized around the evaluation questions. They provide information about the history and background of the cadre, a documentation of the NWREL intervention and a summary of the major outcomes.

The final chapter presents a series of recommendations about the use of the PETC systems for the training and establishment of cadres of educational training consultants.

DESCRIPTION OF THE *PETC* INSTRUCTIONAL SYSTEMS

One of the basic goals of the Improving Teaching Competencies Program (ITCP) is to improve the organizational effectiveness of educational systems. This goal is accomplished by providing educators with practical knowledge and skills drawn from the literature and research group of dynamics, organizational development and planned change. The following two-fold strategy is used:

1. Provide preservice and inservice training programs for all educators in the knowledge, skills and values of basic group processes such as: interpersonal communication, problem solving, interpersonal influence, and conflict and negotiative problem solving.

This first aspect of the strategy is expected to provide individuals and groups with particular group process knowledge, skills and values.

Whether these learnings can be put to effective use in systems and whether they will lead to improved organizational functioning depends on the degree of existing support for such skills and values in the school systems. To provide such support, the second aspect of the strategy is proposed:

2. Train a small proportion or cadre of educators within a school system to be able to provide the following help: training in group process skills *(PETC-I)*, consulting in a temporary relationship *(PETC-II)*, and long-term organizational training and consultation *(PETC-III)*.

The *PETC* instructional systems and change strategies are based on the rationale that educators with these abilities can help people in schools increase their organizational effectiveness. It is expected that educators completing the *PETC* series can provide their organizations with the following improved capabilities:

1. Diagnosing training needs in process skills

2. Providing training activities to meet those needs

3. Strengthening weak organizational functions such as planning

4. Facilitating normative and structural changes in the organization to improve overall organizational effectiveness

The three *PETC* instructional systems were developed with the assumption that participants would have a base of experience, knowledge and skills provided in the other instructional systems developed by the Improving Teaching Competencies Program: *Research Utilizing Problem Solving (RUPS), Interpersonal Communications (IPC), Interpersonal Influence (INF),* and *Social Conflict & Negotiative Problem Solving (SC&NPS).* Descriptions of these systems as well as the purpose and rationale of the Improving Teaching Competencies Program have been provided in Appendix A.

Preparing Educational Training Consultants: Skills Training (PETC-I) is the first in a series of the three *PETC* systems, and is constructed to be a prerequisite to the other two programs. The intended relationship among the *PETC* systems are shown in Table 1. The *PETC-I* graduate is expected to be able to work with small groups, primarily in a training role, to assist in providing group skills such as goal setting, problem solving, communication, influencing, decision making and so on.

DESCRIPTION OF MATERIALS AND STRATEGIES OF *PETC-I*

The *PETC-I* system is a two-week workshop that is organized into two parts. The first part of the program consists of a one-week training program during which the *PETC-I* trainees (skills trainers) study the basic concepts of the instructional system. Also during the first week, the skills trainers are provided with a series of exercises to practice group skills training. The *PETC-I* workshops are conducted by senior trainers who meet criteria specified by the development team.

Table 1

Relationships Among the *PETC* Systems

	PETC-I: Skills Training	PETC-II: Consulting	PETC-III: Organizational Development
Usual Client System	Individual or small group	Small group or major subsystem of the organization	The organization (although most of the work may be with a major subsystem)
Assistance for Client	To increase process skills such as goal setting, communicating, influencing or decision making	To move through phases of an improvement effort	To add and maintain improved functional capability To increase those functional capabilities that enable the organization to add new kinds of objectives or use new kinds of resources
Competencies of the PETC Consultant	Diagnosis for, and provision of, group process skills training exercises	Differential diagnosis and intervention to provide added functions in a temporary relationship	Application of diagnostic and intervention techniques to facilitate normative and structural changes in the organization which a) maintain improved functions and b) make its identity and decision-making dynamic in response to social change
Usual Duration of the Client Relationship	A few hours or days	A few days or weeks	Several months to four or five years
Prerequisite Competencies	Trainer Experience In: Action Research, Research Utilizing Problem Solving (RUPS) Interpersonal Communications (IPC)	PETC-I Interpersonal Influence (INF)	PETC-II System Technology Social Conflict & Negotiative Problem Solving (SC&NPS)

The second part of the workshop is a practicum for the skills trainers. During the practicum the skills trainers form trios, and each trio works with a group of 12 to 24 people. The second training week is referred to as the *Group Process Skills (GPS)* workshop, and the second set of participants are called *GPS* trainees. These sessions, which are conducted over a 5-day period, are designed to allow *GPS* trainees to obtain training in group process skills from the trio of skills trainers.

The materials for the sessions consist of (a) a book of theory papers and training materials for the skills trainers, (b) a book of theory papers for the *GPS* trainees, (c) a *GPS* trainer's manual used by the skills trainers and (d) a book of group skill exercises used by the skills trainers during the *GPS* workshop.

Preparing Educational Training Consultants: Skills Training is intended for use by educators at any level who wish to acquire consulting skills for training others in group processes and interpersonal skills. To be eligible for *PETC-I* training, participants are to have completed two other NWREL programs, *Research Utilizing Problem Solving (RUPS)* and *Interpersonal Communications (IPC)*. In addition, participation in *PETC* is intended to be voluntary rather than required by some external person or agency. The *GPS* section of *PETC-I* is aimed for use by classroom teachers, aides, support staff, parents, central office staff, principals, vice-principals and others in the educational setting who wish to improve their group and interpersonal skills.

GOALS AND OBJECTIVES OF *PETC-I*

The general goal of *PETC-I* is to teach participants to train others in process skills and to facilitate the functioning of small groups. To

this end, *PETC-I* graduates are expected to meet the development team's general cognitive and performance objectives listed below.

Cognitive Objectives

Following the *PETC-I* practicum, skills trainers should:

1. Understand the roles of a skills trainer (manager, facilitator, diagnoser, designer and trainer)
2. Understand dimensions essential for group growth
3. Understand skills needed by members of productive groups
4. Understand the guidelines for selecting, sequencing, modifying and conducting skill training exercises.

Performance Objectives

Following the *PETC-I* practicum workshop, skills trainers are expected to be able to:

1. Assess issues and problems and diagnose skill needs of individuals and groups
2. Select, adapt and sequence skill training exercises
3. Conduct skill training exercises
4. Help individuals identify skills learned and relate them to groups of which they are members
5. Have and use valid rationale(s) for maintaining the design of the *PETC-I* system
6. Have and use valid rationale(s) for selecting, sequencing and modifying skill training exercises appropriate for the needs of the *GPS* group
7. Be capable of being constructively responsive when confronted
8. Be able to create group conditions that are supportive of giving and receiving constructive feedback
9. Be able to recognize and apply interpersonal influence skills as well as to allow self to be influenced when appropriate
10. Know and apply basic skills learned in the prerequisite *Research Utilizing Problem Solving (RUPS)* training .
11. Know and apply basic skills learned in the prerequisite *Interpersonal Communications (IPC)* training

12. Have had the experience of being a participant in a *PETC-I* skills training workshop prior to conducting a *GPS* workshop

13. Have skill in assuming and using each of the five roles of a trainer

Objectives for *Group Process Skills* trainees

Upon completion of the *Group Process Skills* workshop, the trainees will be able to:

1. Assess the existing or potential problems of a group
2. Identify the skills needed to influence or improve those problems
3. Develop and implement a plan to improve the group's processes

In addition to providing knowledge and skills for the *PETC-I* and *GPS* trainees, the training system includes some implicit expectations about the impact of the trainees on their work environments. For example, because *PETC-I* and *GPS* trainees are expected to be able to facilitate communication, decision making and other group process skills, the groups with which they work should develop more open and effective climates. Trainees who are school administrators should promote these qualities among their school faculties; trainees who teach should promote open and effective climates in their classrooms.

Preparing Educational Training Consultants: Consulting (PETC-II) is the second in the series. It is designed to help educators acquire process training and consulting skills. The *PETC-II* graduate should be capable of forming a short-term relationship with a small group or major subsystem of an educational organization. The *PETC-II* consultant helps client groups diagnose problems and improve group functions and processes such as managing, planning, problem solving and decision making.

DESCRIPTION OF *PETC-II* MATERIALS AND STRATEGIES

Preparing Educational Training Consultants (PETC-II) materials consist of a set of trainee materials (a trainee manual), a set of instructional strategies (a trainer manual) and a set of orientation papers which introduce the system and outline procedures for installing or starting up a *PETC-II* workshop. The trainee materials include theory papers, diagnostic instruments, and instructions for doing learning activities. The instructional strategies consist of a set of the trainee materials interspersed with detailed directions for conducting the ten training sessions of a *PETC-II* workshop. These ten training sessions are illustrated on the following page. A typical workshop consists of from 10 to 15 trainees and 2 trainers. A *PETC-II* workshop is divided into three parts, the first consisting of three consecutive 10-hour days of instruction in basic concepts of consulting. Trainees are introduced to a variety of conceptual models and schema related to planned change. These include models developed by Lewin (1951) and Lippitt (1958) and comprehensive diagnostic and intervention models developed especially for this instructional system. Part two is a 3-day practicum in which trainees engage in consulting projects with client systems prearranged by the workshop sponsor. Part three concludes the training with three days of debriefing, evaluation of the consulting practicum, and integrating learnings of the workshop.

Part 1: Sessions 1 through 6 (3 days)

Part 2: Session 7 (3 days)

Part 3: Sessions 8 through 10 (3 days)

Session 1 Introduction to *PETC-II*: Consulting 3 hrs 20 min*	**Session 2** Central Ideas for Consulting 5 hrs 25 min	**Session 3** Assessing and Diagnosing Consultant Skills 3 hrs 50 min	**Session 4** Formation of Teams and Planning Team Consultations 3 hrs 25 min
Session 5 Team Consultations 2 hrs 05 min	**Session 6** Entry Issues and Making Plans to Work with Client Systems 8 hrs 20 min	**Session 7** Consulting with the Client System 7 hrs daily for 3 days	
Session 8 Evaluation of Consulting Experience 6 to 8 hrs.	**Session 9** Integrating Learnings, Part I 6 hrs 30 min	**Session 10** Integrating Learnings, Part II 5 hrs 15 min	

*All times approximate

Conceptual Models

The primary conceptual models presented in the workshop include the Phases of Planned Change, Differential Diagnostic Matrix and the Differential Intervention Matrix. A brief description of these models is presented below.

Phases of the Consulting Relationship

Havelock's extensive review of change models (Havelock, 1973) from the literature in many fields, including education, indicates that the Lippitt, Watson and Westley conceptualization of phases for planned change (Lippitt, 1958) is most inclusive from the perspective of the consultant role. It is adapted and presented as the basic model for a *PETC-II* consultant to use in thinking through his work with a client system.

As he moves through these phases with the client, the consultant repeatedly diagnoses the system's needs of the moment and selects interventions which are intended to be helpful. Generally, there is one large-scale, complex need that led to establishing the client-consultant relationship. There may also be an overall, or macro, intervention involved, such as implementation of a new area of curriculum throughout a school district. The phases of the consulting relationship apply to the major need and the macro intervention strategy that covers the duration of the consultant's temporary relationship with the client system. The phases may cover a time span of hours in one situation and months or even years in another. Within these phases, many micro improvement efforts may be conducted. The diagnostic matrix and the intervention matrix which are presented later apply to both the macro need of the overall strategy and the micro needs worked on within each phase. They are applied repeatedly to large and small issues throughout the phases of a consulting relationship.

Phase 1: Development of a need for change

Phase 2: Establishment of a change relationship

Phase 3: Clarification or diagnosis of the client system's problems

Phase 4: Examination of alternative routes and goals; establishing goals and intentions of action

Phase 5: Transformation of intentions into actual change efforts

Phase 6: Generalization and stabilization of change

Phase 7: Achievement of a terminal relationship

A Differential Diagnostic Matrix for Diagnosing Problems in Human Systems

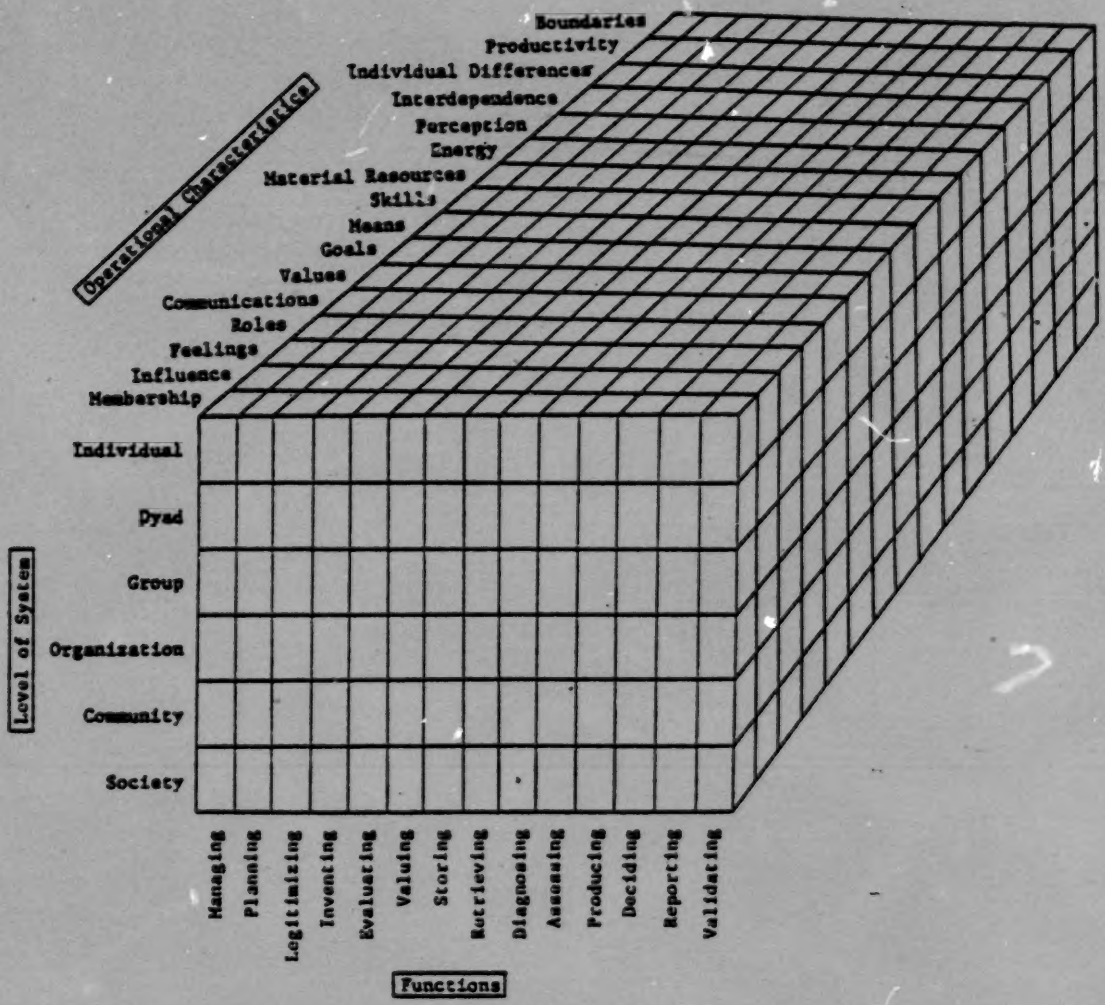
The most important reality about change in education is that it is complex. This stems from the degree to which it involves changing systems that are human. A bolt or even the kind of engine in a car can be changed and the mechanical system doesn't feel it. The industrial organization which, as a system, produced it has no concern with the expectations and attitudes of the product. On the other hand, schools involve people and have an end product of changes in people. The product can and, with increasing frequency, does talk back.

It's all very well to note the importance of recognizing the complexity of change in education. If mankind is to be influenced by educational changes, ways must be found to avoid getting bogged down by this complexity. Analyzing endlessly will be just as problematic as assuming, for example, that all changes are simply a matter of reward. Diagnostic tools are needed to sort out the complexity of any given change situation so that a few, clearly spelled out tasks can be zeroed in on with a reasonable degree of confidence that some critical factor is not being overlooked. A way must be found of differentially *diagnosing* the constraints to be dealt with in human systems as they

move through the phases of change. Furthermore, a way of differentially *selecting* intervention strategies is necessary to facilitate improvement in the human systems of education. As a first step, a Differential Diagnostic Matrix is presented in Figure 1.

Figure 1

Differential Diagnostic Matrix For Locating and Diagnosing Problems in Human Systems



GOALS AND OBJECTIVES OF *PETC-II*

The general goal of the *PETC-II* instructional system is to prepare educational training consultants who can temporarily help educators work more effectively in groups, i.e., committees, task forces and faculties. Therefore, the objectives of the system can be stated for both trainees and consulting client groups.

Training Objectives for Participants

The following objectives are expected to be accomplished by the training strategies:

1. Increase trainee consulting skills (building helping relationships with client groups, diagnosing client needs and problems, and developing and implementing plans for helping clients solve their problems)
2. Increase trainee understanding of key concepts in the consulting process (planned change, symptoms and causes of poor group functioning and procedures for helping groups become more effective)
3. Increase trainee appreciation for crucial consulting issues
4. Increase trainee awareness of their own values and motives for being consultants

Outcome Objectives for Clients

It is expected that prospective client groups for *PETC-II* consultants will have a problem or difficulty that is hindering attainment of their goals or purposes. The consultant is expected to help the client solve the problem in order to facilitate progress toward the client's goals. At the same time, the consultant is expected to help the client become more effective in some jointly selected group processes. Thus, as a result of consultation, a client group is expected to show:

1. Greater understanding of the problem or difficulty
2. Greater understanding of how to solve the problem
3. Greater commitment to implement action steps

4. Greater problem resolution

5. More efficient problem resolution

6. Greater clarity about goals

7. Greater consensus about goals when appropriate

8. Greater commitment to goals

9. More realistic goals

10. Greater progress toward goal accomplishment

11. Increased effectiveness in some group processes such as: improved use of group resources, improved problem solving skills and more dispersed influence patterns

Preparing Educational Training Consultants: Organizational Development (PETC-III) is the last in the series of the three *PETC* systems. This system is designed to prepare persons to provide organizational development training and consultations to schools. To describe this system also requires describing organizational development as a change support process.

Organizational development, as conceptualized by the development staff of the Improving Teaching Competencies Program, is a strategy to promote organizational change. It is based on pieces of theory emanating from the models of "planned change" (Lippitt, Watson and Westley, 1958; Havelock, 1969) and "action research" (Lewin, 1947; Coch and French, 1948). It also incorporates intervention strategies tested by Seashore and Bowers, 1970; Lake and Callahan, 1971; McElvaney and Miles, 1971; Schmuck and Runkel, *et al.*, 1972.

Organizational development aims to help people in schools increase their competencies so they can more effectively manage the human component of their organizations. The basic strategy of organizational development is to provide training and consultation that involve educators in identifying, diagnosing and modifying the norms, structures and

processes of their own organization. Through these normative, procedural and structural changes, it is intended that the organization can build and maintain functional capabilities and that its health will be improved.

The rationale for preparing organizational development consultants for school organizations includes three current situations: (a) schools are not as healthy and as effective as they could be (Miles, 1964; Havelock, 1972; Schmuck and Runkel, 1972), (b) few school organizations have the financial resources to hire outside professional organizational consultants over long periods of time and (c) the number of available outside organizational consultants is inadequate to meet the need.

PETC-III is, therefore, an instructional system and a change support process that can be used by educators at various levels to train organizational consultants who can, in turn, help build and maintain increased functional capabilities in educational organizations.

DESCRIPTION OF *PETC-III* MATERIALS AND STRATEGIES

The system, in its present form, consists of a set of participant materials, a set of instructional strategies to be used with educational managers in a workshop setting, some preliminary plans for installing a *PETC-III* training program and strategies to help those trained in *PETC-III* to use their skills in bringing about structural and normative changes in their schools and to provide organizational training and consultation for client groups.

Preparing Educational Training Consultants: Organizational Development (PETC-III) training is spread over a time period of eight months. During this period, the *PETC-III* trainees complete a one-day preworkshop assignment, attend 17 days of workshop meetings and spend a minimum of 10 days conducting an OD project with a predetermined client group.

An organizational development project focuses on the organization (not individuals, committees or groups of individuals) with a view to building into and maintaining improved ways of functioning in the organization. The project is a series of interventions based on data collected and analyzed with an aim at structural and normative changes to improve the functioning of the organization. A project may be conducted in one part of the organization or in the organization as a whole. An organizational development project becomes possible when the organization's needs and desires have the potential for providing new or increased areas of functional capabilities on a continued basis. The following chart outlines the timeline for major training events.

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8
1 day Preworkshop Assignment	4 day Workshop Meeting	3 day Workshop Meeting		3 day Workshop Meeting	3 day Workshop Meeting		4 day Workshop Meeting

NOTE: There are approximately 30 to 35 days between workshop meetings for OD project work with client groups

Present strategies require that two persons with considerable organizational development experience and skills conduct the *PETC-III* workshop. The workshops are structured so that 12 to 27 trainees, divided into teams of 2 or 3, go through the training together.

GOALS AND OBJECTIVES OF *PETC-III*

The goals and objectives for *Preparing Educational Training Consultants: Organizational Development (PETC-III)* are divided into two categories: (a) trainee outcome goals and objectives and (b) goals and objectives for the organization. The trainee outcomes include their satisfaction with the instruction, their perceptions of its utility and changes in their behavior such as increased cognitive growth and performance change.

Trainee Outcome Objectives

The organization gains a new functional capacity through its new *PETC-III* graduates to diagnose system needs and to produce appropriate organizational development (OD) interventions. The persons with OD skills are prepared to do the following for the organization:

1. Involve the organization in the diagnosis of change needs and in the identification of a change effort
2. Help the organization to stay focused on normative and structural change if the organization so desires
3. Manage the implementation of plans to bring about an increased functional capacity of the organization
4. Either bring about an end to the consulting relationship or to involve the organization in the identification of next steps for organizational development
5. Apply his knowledge to more complex organizational change efforts as he progressively experiences more opportunities for acting in the Organizational Development Consultant role
6. Use concepts in *PETC-III* to make statements about the organization's health and maturity
7. Manage the change efforts, and decide on appropriate interventions, based on data collected
8. Assume a variety of roles to facilitate movement toward improvement; he will be able to shift between several roles
9. Analyze how own values and ideological base for consulting, assess his professional growth needs and establish professional growth goals

In order to help the organization achieve its change objectives, the trainee will be able to use a systematic approach to change by applying the Lippitt model of phases of planned change to manage the change effort. He/she will be able to apply a diagnostic matrix and an intervention matrix as taught in *PETC-II* and *PETC-III* to help him/her determine the most accurate and appropriate analysis of the organizational situation and the most relevant interventions for him/her to make. Moreover, he/she will be able to draw on prior training and experience for help in designing and implementing his/her interventions.

Organizational Outcome Objectives

At another level, however, it is possible to predict observable changes in the part of the organization that receives the benefits of the *PETC-III* graduate services. Specific examples follow:

1. Improved Problem-Solving Capabilities: As a result of training in organizational development, client groups may become more adept at problem solving. They may become more able to:

   - Sense problem situations
   - Differentiate between kinds of problems
   - Attend to problem situations with shared and explicit problem-solving procedures

2. Improved Management of Interpersonal Processes: As a result of training in organizational development, client groups may become more adept at combining people's efforts to achieve desired task goals. It is expected that:

   - Vertical and horizontal communication may become more open, shared and accurate
   - Influence may become more shared and equalized
   - Decision making may become more diffused, characterized by explicit procedures and involvement of those who will be affected by or who are responsible for implementation of the decisions
   - Coordination may become more explicit and accepted

3. Improved Procedures that Support Personal and Professional Growth: As a result of training in organizational development, client groups may become more adept at viewing personal and professional development as an ongoing function necessary to the growth of the group. Therefore, it is expected that the group may provide:

   - Increased training opportunities for members to meet new organizational needs
   - Increased learning resources so members can be continuous learners
   - Increased feedback formally and informally, so members can move toward ways of understanding

4. Improved Ways the Organization Attributes Meaning: As a result of training in organizational development, client groups may

become more adept in the ways they see and explain themselves to the rest of the world. It is, therefore, expected that the group will:

- Have goals which are clear and in which members have a sense of ownership
- Respond appropriately to outside demands

Therefore, taken as a whole, the ITCP systems, particularly the *PETC* series, is a set of interrelated instructional materials that culminate by preparing people for a new role, that of educational training consultant.

FOCUS OF THE STUDY

Over the past few years rather rigorous efforts have gone into the development and evaluation of the *PETC* Instructional Systems.[1] However, the twofold change strategy, which culminates in the preparation of a small proportion or cadre of educators for the role of educational training consultant, has not been systematically implemented and documented. Members of the Improving Teaching Competencies Program came closer to implementing the twofold strategy in Fairfax, Virginia. There, large numbers of educators had been exposed to the basic instructional systems, such as *Interpersonal Influence* and *Research Utilizing Problem Solving*. Additionally, several educators had been trained in the *PETC-I* and *PETC-II* systems. By the fall of 1975, about 25 educators were prepared to be trained in the *PETC-III* system. The Fairfax training would have been

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[1] For an indepth presentation of the development and evaluation of the *PETC* materials, see the following reports produced by the Improving Teaching Competencies Program, Northwest Regional Educational Laboratory:

1. *Field Test Technical Report for PETC-I: Skills Training.* Lohman and Green, July 1975.
2. *Outcome Evaluation Report: PETC-I.* Arends and Green, February 1976.
3. *Field Test and Outcome Milestone Report, PETC-II: Consulting.* Milczarek, George and Schmuck, February 1976.
4. *Pilot Milestone Report for PETC-III: Organizational Development.* Green and Arends, February 1976.

the first time the Program had provided *PETC-III* training to such a large number of educators from the same district. Unfortunately, due to financial restrictions and some reorganization within the district, which made it impossible for several persons to participate in the training, the Fairfax School District was unable to complete the *PETC* training and the two-fold change strategy was not studied.

With the elimination of Fairfax as a *PETC-III* training site, we were forced to choose between (a) training a group of educators who had experienced the other systems and were prepared for the *PETC-III* training but were minimally interested in using the training to create a new role for themselves--that of educational training consultant (ETC), and b) training a group of educators who had not experienced the other systems, but were seeking to create the role of educational training consultant for themselves. The first option would have constituted a repetition of the field testing and evaluation previously conducted. The second option provided the development team with an opportunity to use the *PETC* system in a new and unique way--that is, as resources or tools to be used in training persons for the role of educational training consultant. We chose to pursue the second option.

In making this choice, three factors came to characterize the field test described in this report. First, the original intent of the *PETC* systems was not maintained. Instead of treating the systems as intact, culminative instructional systems, the trainers used the *PETC* systems as a set of resources or tools to be modified and adapted according to situational requirements. Second, a group of trainees was selected that had indicated some interest in creating and establishing the role of educational training consultant for themselves. Third, while the major

portion of the trainers' intervention would be comprised of training the participants to be competent educational training consultants, some attention would be given to the development and stabilization of the role of educational training consultant within the field site. Thus, the primary focus of this study was on the process of adapting and tailoring the *PETC* materials and strategies to the situational requirements of the test site as well as documenting the critical aspects of the accompanying efforts to establish the role of educational training consultant.

CONTEXT OF THE STUDY

With this focus in mind, we set about identifying and selecting a group of educators in a district or area that wanted to become a cadre of educational training consultants. The group selected is comprised of nine educators from the Counties of Monterey and Santa Cruz in California. Following a series of phone conversations with the Director of Special Services in Santa Cruz County's Office of Education and a member of the Cadre, a meeting was arranged between the intervention team and two representatives of the Cadre. During this meeting, we gained some information about the history, intent and status of the Cadre. We shared our interest in working with a group that was actively pursuing the establishment of the role of educational training consultant and our willingness to adapt and modify the *PETC* training to meet the specific needs of the group. The representatives conveyed this information to the Cadre and a meeting was arranged between the intervention team and the entire Cadre.

On March 6, 1976, we met with the Cadre. The trainers presented an overview of the *PETC* systems and provided examples of the material and strategies of the systems. We shared mutual fears and expectations

about the consultant relationship. In particular, the Cadre was concerned that the training would be adapted to their needs. They did not want to experience a "packaged" set of materials and strategies. As agreements were reached about the scope and nature of the consultant relationship, specific times were discussed. It was agreed that we would provide 17½ days of training and consultation to the Cadre. The essence of the agreement is summarized below.

1. NWREL will provide 17½ days of training and consultation to the Cadre on the following dates during 1976:
   April 13, 14, 15 and 16
   May 12 (half day), 13 and 14
   July 2, 3, 4, 5 and 6
   August 8, 9, 10, 11, 12 and 13

   One of the above series of days will be spent in a residential training facility, probably the July series. If the budget permits, NWREL will bear the costs of the retreat facility.

2. NWREL will bear all costs (travel, per diem, salary and materials) incurred by the NWREL trainers and evaluators.

3. All members of the Cadre will participate in the entire 17½ days of training provided by NWREL.

4. Some of the time set aside for training (17½ days) may be used for interviewing Cadre members and having them fill out questionnaires. Additionally, some time beyond that set aside for training may be required for interviewing Cadre members. This additional time will be negotiated with each member individually.

5. The Cadre members will be expected to spend some time between training events completing "assignments" (readings, exercises, self-assessment instruments) that may be given by the trainers.

6. Some time will be used during the 17½ days (training time) to complete the ongoing business of the Cadre. When appropriate, NWREL will provide process consultation for these activities and will incorporate them into the training.

7. We view these agreements as a learning contract. A spirit of collaboration--mutual give and take, mutual participation in identifying learning goals, selecting strategies, and planning the training events--will be encouraged and maintained throughout the consultant relationship.

As indicated earlier, the original intent and focus of this study differed from those previously undertaken by the Program. This, combined with the uniqueness of the field site, the client group and the consultant agreement made this intervention and study novel in several ways. Some of the major conditions that made this field study unusual are listed below:

1. The materials and strategies used in this intervention were selected from those available in the three *PETC* systems, yet no single system was used in its entirety.

2. The participants (the Cadre members) had not experienced the other instructional systems previously held to be prerequisites to the *PETC* series, specifically *Interpersonal Communications, Interpersonal Influence, Research Unitizing Problem Solving* and *Social Conflict & Negotiative Problem Solving*. See Appendix A for a description of these products and their relationship to the *PETC* series.

3. The actual training was tailor-made for the group receiving the training. The *PETC* materials and strategies were adapted, modified and rearranged to fit more closely the needs and capabilities of the client group.

4. There were 17½ days of training provided to the Cadre of consultants over a five-month period. Thus, the sequencing of workshops and timelines specified for the *PETC* systems were modified and truncated greatly.

5. The field test and intervention focused both on the training materials and strategies and on the establishment of the role of educational training consultants in the school district and the strategies used to establish the role of educational training consultant.

6. The Cadre of consultants were not involved in providing training or consultation to client systems concurrently with the *PETC* training. Thus, those strategies and materials in the *PETC* systems that depend upon the availability of client systems required modification or deletion.

Therefore, the *PETC* materials and strategies were used as resources to be modified and adapted to the specific needs and requirements of the Cadre and additional techniques were employed to assist in the creation and establishment of the role of educational training consultant.

Throughout the intervention, diagnostic information was gathered to inform and guide the delivery of training and the efforts to create the role of educational training consultant. Given the fluidity of the intervention--the continual interaction between the diagnosis of the Cadre's needs and capabilities, the selection of training techniques and the emergence of the efforts to establish the role of educational training consultant--the evaluation questions and activities used in this study were necessarily broad in scope and exploratory in nature.

A helpful way of conceptualizing the evaluation activities of this study is to use Stuffelbeam's (1971) model of evaluation. Stuffelbeam describes four kinds of evaluation: context, input, process and product. The evaluation activities used in this study can be categorized as context evaluation, input evaluation and process (or short-term outcome) evaluation.

This study was designed to provide information about:

1. The conditions and factors existing in the school district(s) in the group receiving the training and within the NWREL team that may affect the intervention (context evaluation).

2. The process and rationale employed in adapting and modifying the *PETC* materials and strategies to the specific needs and capabilities of a client (input evaluation).

3. The efficacy of the materials and strategies and the accompanying change support process that comprise the *PETC* instructional systems (process evaluation; short-term outcomes).

EVALUATION QUESTIONS

Listed below are the major questions examined in this study. They have been grouped according to the three purposes presented above.

Questions Related to the Context of the Intervention and Field Test

1. What have been and are the experiences, involvements, exposures and commitments of the county school systems to group process training and organizational development?

2. What have been and are the experiences, involvements, exposures and commitments of the members of the Cadre to group process training and organizational development?

Questions Related to the Adaptation of the *PETC* Materials and Strategies to the Specific Needs of a Client

3. What were the assumptions, rationale, objectives, content, material and strategies employed in the intervention?

4. What considerations were (and should be) made in adapting and modifying the *PETC* materials and strategies to a client's needs?

Questions Related to the Efficacy of the *PETC* Materials and Strategies as They were Adapted and Modified

5. Were the trainees satisfied with the training and what were their reactions and recommendations?

6. What knowledge and understandings were acquired by the trainees?

EVALUATION METHODS AND PROCEDURES

The field methods used in this study place a premium on observing, discovering, conceptualizing, documenting and identifying the critical issues and forces operating in (a) the county school districts, (b) the Cadre and (c) the NWREL team and *PETC* materials. Particular attention will be given to those issues and factors that are associated with our attempt to establish the role of educational training consultant.

Three major methods of data collection will be employed during this evaluation: (a) observation, (b) interview and (c) questionnaire. Specific delineation of how data will be gathered for each evaluation question is provided in Table 2.

Observation

During all training and consultant interventions conducted by the NWREL consultants, two observers were present to document such things as: (a) materials and strategies employed by the consultants, (b) consultant behavior, (c) relations and actions of the Cadre toward the

Table 2

Data Collection for PETC Case Study

Evaluation Questions	Sources of Information	Methods of Collecting Information	When Information Is Collected	Analysis of Recording Procedures
Questions Related to the Content of the Intervention and Field Test				
1. What have been and are the experiences, involvements, exposures and commitments of the tri-county school systems to group process training and organizational development?	Written documents, memos, policy statements, records at district and school level	Collection of relevant documents, etc.	Throughout the evaluation, with particular emphasis in early stages	Summaries to appear in final report
	Key decision makers, district personnel previously involved with the cadre of consultants, former consultants and trainers to the cadre of consultants	Interview and conversation	Throughout evaluation, emphasis in early stages	Summaries to appear in final report
2. What have been and are the experiences, involvements, exposures and commitments of the members of the TRIOD cadre to group process training and organizational development?	Written documents, memos and records of cadre of consultants, records of trainers previously involved with cadre	Collection of papers, etc.	Throughout the evaluation	Summaries to appear in final report
	Cadre members, former consultants to cadre, district personnel involved with cadre	Interview and observation	Throughout the evaluation	Summaries to appear in final report
		Background Questionnaire	Early session of intervention	Summary table to appear in final report
Questions Related to the Adaptation of the PETC Materials and Strategies to the Specific Needs of a Client				
3. What were the assumptions, rationale, objectives, content, material and strategies employed in the intervention?	Trainers and evaluators	Trainer records Observation and documentation	Throughout the evaluation	Descriptive summary to appear in final report
4. What considerations were (and should be) made in adapting and modifying the PETC materials and strategies to a client's needs?	Trainers and evaluators	Records of intended training activities, observations and documentation of actual events	Throughout the evaluation	Information will be analyzed, studied and tentative conclusions will be presented in final report
Questions Related to the Efficacy of the PETC Materials and Strategies as they were Adapted and Modified				
5. Were the trainees satisfied with the training, what were the reactions and recommendations?	Participants (members of the cadre of consultants)	Interview and Questionnaire	Throughout the evaluation, particularly in the latter stages of the intervention	Summaries to appear in final report
6. What knowledge and understanding were acquired by the trainees?	Participants	Self-Assessment Questionnaire: Consultant Skills	In early session of intervention and again at conclusion of training	Summary table(s) and discussion to appear in final report
		Knowledge Test	At conclusion of PETC training	Summaries with descriptive statistics and discussion to appear in final report

consultants and the training and consultation activities, (d) evidence of normative or structional changes in the Cadre and (e) actions and reactions of the Cadre toward the district organization. In addition, relevant documents, memos, records, descriptions of past experiences with process innovations, etc., that provided information concerning prior experiences of the county school districts or the Cadre were sought and read.

Interview

Much of the information for this study was collected by interviewing relevant actors. Interviews were sought from the following groups: (a) relevant district personnel, e.g., key decision makers, persons previously involved with the Cadre of consultants, members of client systems, (b) members of the Cadre (persons receiving training) and (c) other consultants and trainers previously involved with the Cadre.

Questionnaire

Certain information, particularly that relevant to knowledge and understanding of the participants, was gathered by means of questionnaires. Also, background information on the participants was collected by questionnaire. Complete copies of the interview schedules and questionnaires used in this study are presented in Appendix D. Chapter 4 summarizes the data gathered by interview, questionnaire and observation. While all relevant data are reported, certain interview questions and questionnaire items are not discussed due to limited usefulness of the information rendered by them.

CHAPTER 2: HISTORY OF THE CADRE

In 1974, three relatively small costal counties in California joined to support an innovative effort aimed at developing and training a group of internal organizational specialists. This chapter provides background information about this innovative effort. The activities and events described in this chapter occurred prior to NWREL's entry onto the scene and constitute a history of the relevant experiences and efforts of local educators to establish and train a cadre of organizational specialists. The chapter has been divided into four sections. The first provides descriptive information about the three counties and their educational systems. The second, describes early efforts to build support for the cadre concept and establish a network of educators who would be knowledgeable and supportive of OD efforts. The third traces the efforts of this network of educators and describes the recruitment and selection of the Cadre. The fourth describes the training received by the Cadre prior to the training provided by NWREL.

THE THREE COUNTIES

At present, support for the effort to establish an internal cadre of organizational specialists comes from the three county offices of education. Each county, although different in their understanding and support of organizational development, has similar educational systems within their county offices of education. The County Office of Education in each of the three counties have offices titled Special Services that resided in the Educational Services Division. In all three counties organizational development became a part of the Special Services

through which resources were linked and coordinated. Goals and objectives of the Special Services programs were similar in all three counties giving continuity and guidelines to the organizational development program.

Primary and secondary schools are organized by districts in each of the counties with some of the schools a part of unified districts, while others are a part of elementary and secondary districts. Each county has at least one junior college within their boundaries, with the largest county having a California university as part of its educational structure.

Communities within all of the counties have similar industrial and community services, although the population of each county is quite diverse in size and geographic space. Relative to each other, one county is three times the size of the smallest county and approximately twice the size of the other county. Respectively, monies allocated by each county for the organizational development program is representative of that county's size and budget. The largest county offices provide 50 percent of the OD budget plus additional support services, while the other two counties supply 33% and 17% of the program money.

While the tri-county area joined officially in 1974 to conduct a three-year organizational development training program for educators, the origin of organizational development efforts in the area started several years earlier.

EARLY EFFORTS TO BUILD SUPPORT

The genesis of Organization Development (OD) related efforts began in the largest county in 1972. In an effort to improve the linkage and coordination of county services with the needs of schools and generate

new, more effective methods to serve schools. The county office turned to the practices and principles of OD. The Director of Special Services was especially interested in the possibility of creating an on-going capacity within the county to improve the organizational processes in schools, districts and county agencies. The establishment of an internal group of organizational specialists appeared to be one way of creating this kind of capacity. The Director began to inform himself about the work of Schmuck and Runkel and their efforts to establish internal cadres of organizational specialists.

Through contact with Schmuck and Runkel, several consultants who had previous experience in establishing internal cadres, provided technical assistance to the County Office and the Director of Special Services. These interactions resulted in a strategy to disseminate the concepts of OD and inform local educators of the goals and practices of OD. The first activities associated with this plan occurred during the 1972-73 academic year. Supported by a budget of more than $20,000 from the County's Special Services Program, a series of small workshops for administrators were conducted, discussion groups were formed and led by OD and management consultants, OD consultant services were offered and rendered to various schools and educational agencies and informal luncheons were held. All of these activities were to serve the purpose of disseminating information about OD and interesting local educators in the application and use of OD practices.

This first year of disseminating OD concepts and practices culminated with the annual workshop for school administrators and board members in the fall of 1973. The program for this annual workshop focused on OD, its use and application, with special emphasis being given to the topics of: conflict resolution, leadership styles and meeting skills and

procedures. This event was the first large scale attempt to familiarize large numbers of administrators and policy makers with Organization Development. Participants' overall evaluation of this event was favorable and plans were made to continue the dissemination of OD concepts and skills.

During the following academic year, 1973-74, efforts aimed at informing administrators continued through the offering of small workshops and discussion groups. Simultaneous with these small group workshops, a careful recruitment and selection effort was being conducted by the Director of Special Services. Twelve county and district administrators within the three counties were identified and offered special training in OD theory and practice. Participants received one week of training that provided them with a more indepth study and conceptual overview of organizational theory. The training was intended to establish a formal network of administrators throughout the tri-county area that understood the concepts and use of OD; that would promote an OD effort in their region by actively promoting OD efforts during the upcoming year; and finally, would actively model and use their new OD and GPS skills on their jobs and in OD group meetings. This group constituted the pre-cadre.

The selection procedure for the pre-cadre was informal and primarily designed by one man, the Director of Special Services. He began the procedure by seeking out several strong and responsive administrators in the tri-county area--responsive in the sense of being open to new educational ideas, especially OD (but not exclusive of OD). Strong administrators were defined as being (a) those who exerted influence in their area, (b) were dependable in their offices, (c) had a history of

involvement in innovative educational programs, (d) and were viewed as leaders by other administrators. At this point in the selection process the Director (and self-appointed selection agent) began talking to all administrators whom he knew to have the above qualifications.

The informal talks took place over a period of eight months, with each administrator being informed about the possible creation of an internal group of OD consultants. For details about this model, see Schmuck and Runkel (1973). Selection of administrators for the training workshop was by a cross-validation plan. For each choice made by the Director, four additional opinions were sought from other people who knew the strength and openness of that person. By getting others' perceptions of a potential participant, the Director was able to have confidence in his choice of the 12 administrative participants. These administrators represented offices of district superintendents, county directors of education services and school principals. Representation was distributed proportionally to each county by size, with only one participant from the smallest county, while the other two counties had 5 and 6 participants respecively. The Director of Special Services and organizer of the OD efforts to date, included himself as a participant in the training workshops which took place in August of 1974.

Consultants from Oregon, who had been involved in the August 1973 OD training for administrators, were hired to conduct the week-long August workshop and followed a training design which included:

1. Theory and technology of organizational development
2. Problem identification and solving
3. Decision making skills
4. Group process training and consultation
5. Diagnosing and designing training sessions

6. Consultation skills

7. Conflict resolution

At the conclusion of this one-week workshop, two significant events occurred. First, was the hiring of three private consultants to conduct OD efforts in schools within the largest county. The $26,000 budget originally used to start the tri-county OD efforts by financing the workshops and training events was redistributed. The three consultants now had sole use of the money for their OD efforts within the one county. The money used to support the tri-county OD project came from another source and was considerably reduced from $26,000 to $3,600. Strategies and formal procedures for the continuance of some of the $26,000 to support the OD tri-county efforts were not established. Lack of planning sessions, coordination and a systematic strategy on the part of the Director of the Tri-County OD Project and the three consultants, resulted in divergent goals, separate and unrelated efforts and a general fracturing of the OD thrust in the fall of 1974. Therefore, concurrent but uncoordinated OD efforts began to take place in Santa Cruz School systems which added to school educators exposure to OD. Continuity did exist in OD personnel, as one of the consultants served in two roles; one as the coordinator and consultant in the Tri-County OD Project, and secondly, as private consultant in the Santa Cruz County OD efforts.

The second critical event to occur in the fall of 1974, which had major impact in the development and dissemination of OD in the tri-county area was a second two-day workshop for administrators and school personnel. This workshop, the same annual meeting that had occured in the fall of 1973, followed the one-week training session for the 12 pre-cadre members. Again, several trainers from Oregon were hired to conduct the session. The focus of this session, was on the use of OD in

schools, with simulations and exercises being used as the primary technology. The expectations of most participants were for task group problem solving around current issues in their schools. The mismatched expectations between participant and the training design, led to some disruptive behavior during the workshop. Many participants were unattentive and left sessions early. The final evaluation showed less than favorable responses by nearly half of the participants which resulted in unfavorable attitudes toward the concepts, strategies and usefulness of OD in schools by a large portion of the workshop participants. The occurance of these two events established some of the initial attitudes held by administrators about the concepts, strategies and technologies of organizational development. Some administrators viewed the strategies and concepts of OD as relevant and useful and enthusiastically availed themselves of the OD services provided by the three private consultants. Other administrators supported the efforts to establish a group of internal specialists. However, many administrators were less than enthusiastic about the use and application of OD strategies and specialists in their districts and schools.

Thus, at the beginning of academic year 1974-75, two groups were actively involved in the propogation of OD technologies and concepts. The three external consultants began making interventions and providing consultant services to various groups and schools within Santa Cruz County. And a network of informed administrators--the group that attended the special one-week workshop on OD--, the pre-cadre continued their efforts to build support for and understanding of OD concepts and strategies.

THE PRE-CADRE

The pre-cadre was formed with a mandate to continue the OD dissemination processes started by the Santa Cruz County Office of Education. They agreed to spend one year in activities designed to inform other educators in the three counties of benefits of OD and/or the creation of an internal cadre of OD specialists. Specifically, the mission statement was:

> "To establish a clear, specific plan that would recruit 36 highly skilled people to become the OD cadre for the tri-county area."

The goals and objectives of the group at the end of their one-week workshop were:

1. To plan and inform a significant number of educators about OD by performing seeding activities over the 1974-75 school year.
2. To increase their own skills and knowledge of OD by way of monthly meetings. Business and self-renewal were the primary goals of these monthly meetings.
3. To establish group norms and agreements for their pre-cadre group.
4. To build a model that schools would follow for getting funding for OD.
5. To formulate a plan for funding a tri-county OD program.

The pre-cadre generated situation data about the status of existing organizational development programs in each county and planned a number of seeding strategies and activities for the 1974-1975 school year.

The primary concern among pre-cadre members was the unequal participation, commitment and involvement of educators in the three counties. This was especially true in the larger county where most of the aforementioned dissemination activities had occurred. Among other concerns were: the expressed skepticism of administrators in all three

counties about another new educational program; participants questioned the educational payoffs for the schools and the short- and long-term benefits for staff as well as students. Interest for improvement in school systems was evidenced by the identification of several schools that appeared ready for organizational training. However, most of the sites were located in the county where other OD efforts were simultaneously occurring and had been occurring for two years.

Thus, the seeding strategy began its development and proceeded to consume the majority of the pre-cadre's time and resources throughout the year. The primary strategy consisted of a series of workshops in each of the three counties to present an overview of OD; conflict management; and power and leadership topics. These workshops were publicized by brochures and special invitations to educators. Each of the pre-cadre members selected a few people whom they knew would be interested in OD and who also might be potential new members for the OD training program the following year.

The original mission statement included a timeline for selection of 36 members of an OD cadre with a budget of $12,000 for the initial three-week training. The three-week training design was to follow the models used in both the Eugene and Kent Cadres. (See Arends and Phelps for Eugene; "Establishing Organizational Specialists Within School Districts," 1973; Runkel, Wyant, Bell. "Four Years of Innovation: OD Specialists in School District," 1975; for details of the Kent effort.) As the year proceeded and the pre-cadre came closer to the selection of cadre members, several events unfolded which compounded the original mission. First and foremost, the planned budget of $12,000 was cut to $3,600 for the three-week training program. The change in the amount of money, coupled with the change in funding source from one county office of

education to all three county offices of education presented new problems for the pre-cadre.

Late in the spring of 1975, the pre-cadre regrouped to adjust their plans and strategies to this new set of complications. Several key factors surrounding this meeting had considerable impact on its outcome. First, all members were not present to refocus their strategies and provide resources for problem solving the lack of funding and new funding sources. Therefore, a few members were forced into deciding crucial new goals that refocused their mission. Second, the decision about training strategies for the 1975-76 Cadre members was limited by the knowledge of the members at the time of this meeting. Finally, planning and reporting functions were not identified for updating those members not present. The outcome of this meeting was a change in mission statement which read:

> "To select 12 educators for an OD training program that would be developmental given the constraints of funding."

The funding for the Cadre training program was through an organization called the Tri-County Cooperative consisting of all three county superintendents and the Association of California School Administrators' (ACSA) Region X President. These four administrators used their special funds to support educational programs serving all three counties. Because their total budget was limited, and there were several programs requesting funding, the decision was made to fund the OD Cadre training for the 1975-76 year at $3,600 instead of the $12,000 requested by the pre-cadre. This reduction in funding, coupled with the limited applications for training, refocused the original design and mission of the pre-cadre late in the spring of 1975. The new mission

was to select 12 educators and design a less intensive training program that could be designed and developed with the constraints of $3600.

The selection plan for the Cadre was formalized in the fall of 1974 and remained consistent throughout the change in mission. The plan followed the criteria used in Eugene for selecting Cadre members (see Appendix B).

Although the selection process was carefully planned and developed, in the final analysis an actual selection did not occur. Several factors entered into the lack of applying the selection design. However, the primary factor was the fact that only 14 applicants sent in a formal application to the selection committee for perusal. The selection committee, made up of Santa Cruz County OD consultants and ACSA representatives, rated each applicant on their background knowledge and experiences, influence in their job, understanding of OD technology and concepts and strength of recommendations (see Appendix B). However, due to the small numbers applying, very little selection actually occurred, with 12 of the 14 applicants being admitted to the year-long training program in OD.

By June 1975, all 12 applicants had been notified of their selection, and met for an initial get-acquainted session with pre-cadre members, consultants and other Cadre trainees. This joint meeting was the final session held by the pre-cadre and was attended by only three of the original 12 pre-cadre members. These three pre-cadre members were to become members of the new Cadre. Lack of attendance, follow-through and commitment by most of the pre-cadre resulted from a breakdown in communications, planning, strategizing and characterized the expiration of the pre-cadre as a group. In essence, the pre-cadre dissolved with the selection of the 12 Cadre members.

THE CADRE

In August of 1975, those persons who had been selected to become members of the Cadre gathered for a three day training session. The overall goals of the training were to build commitment among members to a tri-county OD effort and delineate a strategy for the establishment of the group as a viable cadre of internal OD specialists. At the onset of the training, several expectations were made explicit by the Director of the Project, the Director of Special Services in the Santa Cruz County Office of Education and the external consultant, Shareen Young. This was done by having members list their hopes, fears, needs and expectations and comparing these statements among members. At the end of the first day, there was considerable confusion and frustration generated by different perceptions of the goals and objectives of the tri-county OD Project. Several members expressed interest in receiving training in OD, but were less interested in becoming internal consultants. Others indicated surprise at the expectation of the Director that this group would become an internal cadre. Two persons chose to withdraw from the group because of these misunderstandings. At the conclusion of the first day, 10 people remained to be trained as a cadre of internal OD specialists. This group was comprised of three pre-cadre administrators, one junior high school vice principal, three elementary school teachers, one elementary school principal and two classified personnel. These 10 people represented only the two larger counties of the original three counties which started the pre-cadre, even though 17% of the money supporting the group's organization and training was provided by the smallest county.

Members of the Cadre came to the group with acute differences in background and skills. A self-assessment instrument administered at the

end of the first day helped to build a composite picture of the group and revealed several members having limited background in group process skills, communication skills and organizational development theory. All members rated themselves high in influence as they perceived themselves impactful in their school or district role. Most members had strong recommendations from their supervisor or colleagues in the following areas: helpfulness on their job, ability to communicate well, willingness to take risks, leadership capabilities and enthusiastic attitudes about new educational ideas.

The events of the first day resulted in much group confusion and an emphasis upon individual needs and expectations, rather than general group needs and mission. The following two days of training were spent in producing problem statements that addressed the concerns, needs and expectations of each group member. At the end of these first three days of training all but one member felt they had accomplished the goals of the three days. However, there was still expressed misunderstanding and confusion about the structure of the Cadre and it's function and place in the tri-county area. Most members felt they had been open and clear in their communications with each other and expressed excitement for the training program and group meetings during the coming year.

By the conclusion of these three days of training the Cadre had generated the following list of objectives for the 1975-76 academic year:

1. By June 1976, each member will have gained sufficient knowledge and skills through classes, workshops, conferences, seminars and practical experiences to prepare him/her for involvement as a consultant team member with a client system in the tri-county area during the 1976-77 year as evidenced by an individual needs/fulfillment chart maintained by each member.

2. To develop skill training packages in communication skills, problem solving and meeting skills.

   a. For training within the group
   b. For use within the tri-county area

3. Consultant teams will be developed by August 15, 1975, according to agreed upon criteria:

   a. Geography
   b. Dates
   c. Interests - packages
   d. Needs and strengths

4. Given the differing opportunities for attending classes and conferences, doing directed reading, working in skill-teaching situations and/or shadow interning, the entire cadre will meet to share experiences, make group decisions and engage in debriefing a minimum of nine times during the school year.

   The purposes of these meetings will be to:

   a. Make decisions
   b. Maintain team identity
   c. Share experiences and information and have seminars (at no cost to budget)

5. The group will pursue and engage in cadre training sessions provided by outside consultants to the extent the budget of $3,600 permits. These activities will be in addition to the training activities listed above.

6. During the 1975-76 year the group will present goals and plans to pre-cadre members and Tri-County Cooperative.

7. By June 1976, potential client systems will be identified and established as clients for 1976-77 year.

In addition to generating a list of group objectives, the group discussed how they wanted to function--how they wanted to run their meetings, how they wanted to interact and how they hoped to work together. These group agreements, the list of group goals and some planning for the September training and business meetings constituted the major accomplishments of the first three days of training. From August 1975 to February 1976, the Cadre continued to gather monthly

to discuss business matters and participate in training activities. The substance of the training that occurred during this time is summarized in Table 3 below.

Table 3

CADRE TRAINING

1975-1976

Training Dates	Training Techniques	Training Materials	Skill Areas
August 1975 (3 days)	1. Problem identification 2. STP problem solving 3. Goal setting 4. Group agreements 5. Communication skills 6. Yearly objectives	1. *Who Am I?* (Schmuck, Runkel, *et al., Handbook of Organization Development in Schools.* 2. *The Interpersonal Gap* (John Wallen 3. *What is a Team?* (James L. Creighton, Synergy) 4. *Joint Inquiry With the STP Model* (Fosmire and Wallen) 5. *Basic Communication Skills* (John Wallen	1. Paraphrasing 2. Perception checking 3. Describing own feelings 4. Describing behavior 5. Problem solving
September 1975 (4 hours)	1. Constructive openness 2. Meeting skills 3. Giving and receiving feedback	1. *The Concept of Feedback* (NWREL materials) *The Interpersonal Effects of Various Responses* (John Wallen) *Constructive Openness* (John Wallen)	1. Feedback 2. Group meetings 3. Openness
October 1975 (4 hours)	1. *LIFO* training	1. *LIFO* training materials	1. Self-assessment of leadership style
November 1975 (4 hours)	1. OD theory and concepts 2. Model building	1. Development of OD conceptual materials	1. OD theory 2. Model building
December 1975 (1 day)	1. Team building 2. Process observation in groups	1. *Friendly Helper* (Schmuck, Runkel, *et al., Handbook of Organization Development in Schools* 2. *What to Look for in Effective Groups* (Puper and Jones)	1. Giving and receiving feedback 2. Process observation
January 1976	1. Conflict management 2. Interdependence 3. Organiztional theory	1. *Strategies of Organisational Development* (R. Beckhard) 2. *Managing With People* (Fordyce and Weil) 3. *Organisations* (March and Simons) 4. *Management Review* (Schmidt)	1. Conflict resolution 2. Decision making 3. Problem solving 4. Consultant strategies
February 1976	1. OD interdepence and collaboration between organizations	1. *Non-verbal Models of Collaboration* (Young)	1. Collaboration of OD Specialists' Resources

The February event constitutes the last training activity of the Cadre that occurred prior to the NWREL intervention. It was during February that initial contact between NWREL and the Cadre occurred. This led to the meeting of March 6, where a consultant agreement was negotiated and subsequently to the NWREL training sessions of April, May, July and August. A detailed description of the NWREL training sessions is provided in Chapter 3.

CHAPTER 3: THE TRAINING INTERVENTION

In this chapter a detailed account of the strategies and techniques used in the four interventions is presented along with a brief description of the particular background and expertise of the intervention team.

THE NWREL INTERVENTION TEAM

Ruth Emory and René Pino were primarily responsible for the training and consultation provided to the Cadre. They also represent the team that conceived and developed the *PETC* systems. Over the past few years innumerable hours of their time has been devoted to the designing, testing, redesigning and retesting of the materials, strategies and procedures that make up the *PETC* systems. More than any other two persons, Ruth Emory and René Pino possess an understanding and appreciation of the goals, methods and rationale of the *PETC* instructional systems.

Warren Bell and David Green were primarily responsible for documenting and evaluating the intervention. David Green has wide experience with the *PETC* systems, both as a trainee and evaluator. Warren Bell, while relatively unfamiliar with the *PETC* systems, has participated in the documentation and evaluation of two other efforts to establish cadres of educational training consultants. These cadres are the Kent and Eugene cadres installed by the Strategies of Organizational Change Program, Center of Educational Policy and Management at the University of Oregon.

While the roles and responsibilities of the intervention team were differentiated into trainer and evaluator, the actual performance of the team led to considerable intergration of these roles. This was

especially true in the early stages of the intervention when data was collected to diagnose the group's skills and needs and guide the training as well as to inform the evaluators in preparing the case study. For example, in gathering information about the history of the Cadre, several prior consultants of the Cadre were contacted and interviewed by the evaluators. This information was freely and immediately shared with the trainers to inform their designing and strategizing. In fact, during the early stages of designing for all of the four interventions, the four of us typically shared ideas, perceptions and concerns about the readiness and skills of the members, the norms and dynamics of the group, and the demands and pressures of the environment on the group. In this way, the knowledge and expertise of the entire team was used in designing the training and consultation activities provided to the Cadre.

THE NWREL INTERVENTION

The NWREL team provided four sessions of training and consultation to the Cadre. The first session consisted of four days in April, the second a two and a half-day session in May, the third a five-day session in July and the fourth a five-day session in August. In all, NWREL provided 16½ days of training and consultation to the Cadre. This is one day less than originally agreed upon. The August session was reduced by one day due to conflicting demands of certain Cadre members.

Throughout the intervention, the trainers assumed many roles besides that of trainer. For example, they sometimes took the role of instructor, advisor, evaluator, data collector, analyzer and diagnostician and observer. They constantly performed the role of modeler which had impact on the Cadre. At several points during the intervention various Cadre members would indicate an insight or understanding by saying "Oh, when

you do 'such-and-such' with us, your're actually doing this or trying that, right?" Even so, the major role performed by the trainers was that of trainer.

In the following sections, a detailed description of each intervention session is presented. In planning and designing each intervention the NWREL team used the theoretical model for planning interventions developed by Lee Bolman. This planning model requires the consultant to prepare a list of situational statements and assumptions along with a list of goals and objectives. From these are derived a set of strategies which are used to guide the selection and sequencing of particular techniques. This theoretical model was also used in presenting the intervention in the following sections. For each session we present a brief narrative description of the context and critical events. This is followed by the lists of situational statements, assumptions, goals, and strategies that were used to select and sequence the training techniques. Brief descriptions of the materials used during the intervention are presented in Appendix C.

April Session

Prior to the four days of April training, the NWREL team had had only limited contact and information about the Cadre. We had met for most of one day with Cadre representatives in the early stages of contract building. We had sketchy information from interviews with other consultants who had worked with the Cadre. We had spent one day in March with the entire Cadre sharing hopes, expectations and fears concerning the training and finalizing an agreement for the intervention. The details of the consultant agreement are presented in Chapter 1. In brief, NWREL agreed to provide 17½ days of tailored training and consultation to the Cadre.

Therefore, as we prepared for the April training much of the designing and adapting was based upon little first-hand information about the skills and needs of the Cadre. To further complicate matters, certain misunderstandings about the consultant agreement had become apparent between the March meeting and the April training, and these were going to require some clarification before the training could proceed. In an effort to gain additional information about the Cadre and the apparent misunderstandings, the NWREL team met with the Cadre's primary consultant the evening before the April meeting.

Within this context, we entered the April training with the hope of (1) clarifying the consultant agreement, (2) sharing our perceptions about the Cadre and gaining additional information and understanding of the skills, needs, procedures and history of the group, and (3) providing training to enhance the skill trainer capacity of the Cadre members.

Much of the first day of the April session was spent in clarifying the consultant agreement and sharing information with the Cadre about our perceptions and understandings of their goals and agreements as a group and their hopes and expectations for the future. This was followed by about a day and a half devoted to having Cadre members identify problems relevant to the Cadre, conduct force field analyses of the problems, and assess the skill needs of the group in light of the problems. Following the skill needs assessment, a second day and a half was spent in having the Cadre members select and adapt skills exercises and conduct those exercises using other Cadre members as the client system. The materials used in this session were drawn almost entirely from the *PETC-I* Instructional System. A more detailed description of the April session is presented in the following pages.

At the conclusion of the training, a half day was set aside for the Cadre to conduct a business meeting. During this meeting, the NWREL team observed and provided feedback concerning the group's process of conducting business.

Below are the situational statements, assumptions, goals, strategies and techniques that comprised the April session.

April Design

Situational Statements

Data collected in March of 1976 indicates that the Cadre faces a situation characterized by the following:

1. Lack of funding to receive adequate training and to find time to do consultant work.
2. The competence of group members varies, some have had more experience and training than others.
3. They face conflicts between district requests for service and job responsibilities.
4. Lack of time represents one of the greatest concerns of the group.
5. Lack of skills, knowledge and confidence are big concerns.

Assumptions

1. They are not ready for OD training--they need pre-OD prerequisites and training.
2. They need knowledge about group processes and confidence in making training interventions.
3. They appear to be more interested in being a "group" than in providing services.
4. They need to do reality testing and test their hopes, aspirations, goals, intentions against the obvious constraints of lack of funds, time and skills.

Goals

1. To enable Cadre members to develop skill trainer capacity.
2. To help them find legitimacy in the tri-county and to develop strategies to render training services.

Step 5: Cadre reactions to overall plans

Directions: Discussion

Time: 30 minutes

Step 6: Force Field

Directions: Produce a list of forces for and against the development of an effective helping relationship between NWREL and the Cadre.

Time: 20 minutes

Step 7: Learning Contract

Directions: Review agreements concerning times, places, resources, responsibilities and commitment to learning.

Time: 10 minutes

Step 8: Introduce training sequence

Directions: Review April training schedule, what's been done, where we are, where we are going. Present rationale for training in light of data feedback and overall training plan.

Have participants read Paper 2, pages 1 and 2.

Materials: Chart #1, *PETC-I*, Paper 2

Time: 10 minutes

Step 9: Problem Analysis Program

Directions: Modify Exercise 18 by asking participants to work individually. Also ask them to focus on the Cadre and their relationship to it.

Materials: Group Process Skills, Exercise 18: Personal Program Analysis Program

Time: 30 minutes

Step 10: Initiate Needs Assessment

Directions: Have participants read Paper 4, "Dimensions Essential to Group Growth," form trios, and have trios complete Paper 5, "Four Views of My Group."

Materials: *PETC-I*, Paper 4, *PETC-II*, Paper 5, *PETC-I*, Paper 8, *PETC-I*, Paper 5

Time: 200 minutes

Materials: *PETC-I*, Papers 9, 20 and 21

Time: 4½ hours

Special Directions:

Have participants:

1. Modify exercises to 60-minute time limit and adapt them
2. 30 minutes will be devoted to debriefing the exercise with input from participants and trainers

Step 17: Conducting Skill Exercises

Directions: Have trios conduct selected exercises according to guidelines set out in Step 16.

Debrief exercises using guidelines set forth in Paper 19.

Materials: Group Process Skills #4, 21 and 14 (these exercises were selected by the Cadre trios and conducted by trios using the remaining Cadre members as trainees. A description of these exercises is attached to the catalogue and description of materials.)

Time: 6 hours

Step 18: Debrief of April Training

Directions: Present Papers 20 and 37; have individuals read and react to these after the training session.

Discuss the problems, concerns, hopes and fears generated by the April training.

Materials: *PETC-II*, Papers 20 and 37

Time: 60 minutes

May Session

During the May session, the trainers engaged the Cadre in an information gathering process that was aimed at helping the group in planning for its future. Several days before the session, the Cadre members received and were asked to fill out a questionnaire. The questionnaire provided the Cadre and the trainers with information about

(1) how the Cadre was viewed in the various districts; (2) how the Cadre was viewed by its members; and (3) what kinds of internal issues were most pressing. A copy of the questionnaire is presented in Appendix C.

In addition to the questionnaires a report of the Cadre's activities and a request for further funding along with a plan to reorganize the management and coordination of the Cadre had been prepared. This report and plan for reorganization was to be shared with the Cadre for their reactions, revisions and recommendations. Unfortunately, the report and plan for reorganization included some important shifts in the roles of certain members and some changes in the goals and functions of the group. To further complicate matters, the report and plan for reorganization had been prepared by the Director and an outside consultant with little or no input from Cadre members themselves. It was our expectation that the p oposed changes and particularly, the process by which they were developed, would lead to considerable resistance within the group and possible conflict among members on the issues of coordination, management and direction.

Therefore, given our perceptions of the pressing internal issues and the unclarity and uncertainty of the Cadre's future, a design was prepared that would provide the Cadre with an opportunity to clarify and plan for its future. The first day and a half was spent in sharing information generated by the pre-session questionnaire and reacting to the report and plan for reorganization prepared by the Director. The last day was spent in task groups working on possible plans and strategies to solve some of the Cadre's problems. A detailed description of the design is presented on the following pages.

The May session differed from the other three sessions in several aspects. First, it was the only session that was almost exclusively

devoted to assisting the Cadre in strategizing for its future and exploring the problems of becoming an organization that could maintain itself. Second, the May session was marked by internal conflict and confusion concerning goals, functions and roles. Third, in response to the fluidity of the situation, the trainers were required to redesign portions of the intervention as various issues and problems emerged. In fact, the NWREL team spent many long hours at the end of each day debriefing the day's events and adjusting the design to meet the situation. And fourth, unlike the other three sessions when the role of the NWREL trainers was primarily that of trainer, during the May session the trainers acted as process facilitators. The facilitation took the form of process observer, organizer, and convener in which the trainers clarified communications, checked perceptions, recorded and organized information, provided the group with various problem solving schemes, raising critical questions, managed conflict, and generally augmenting the planning, problem solving and deciding functions of the group.

Below are the situational statements, assumptions, goals, strategies and techniques that comprise the May intervention.

May Design

Situational Statements

Certain internal issues appeared to be causing an ambiguous situation with the group. Primarily these issues had to do with the role of outside consultant and the role of the Director, the person who represents the official sanction of the group from the Santa Cruz District. The outside consultant felt uncertain about her role and her relationship to the Director. Involved here were issues of budget, decision making and role expectations. The group had a history of three outside consultants and faced issues of intimacy, maturity and influence. The issue of survival was paramount.

Assumptions

1. The group is really not in touch with a number of feelings about each other.
2. The Director is keeping hidden information and feelings.
3. The outside consultant's role is unclear.
4. The Director's role is unclear.
5. Lack of role clarification is causing confusion.
6. The Director's unilateral decision to not be present in the July meeting will cause problems.
7. The Cadre has not really given consideration to what it means to be an organization in the tri-county school systems.

Goals

1. Deal with the Cadre's future by collecting and analyzing data about the basic issues concerning the Cadre--self-definition, self-perception.
2. Involve the group in role renegotiation and contracting for future work.
3. Provide the group with problem solving procedures.
4. Involve the group in strategizing for the future.

Strategies

1. Enable participants to clarify roles and do role renegotiation.
2. Enable group to do planning for the future of the Cadre.

Techniques

Step 1: Introduction

Directions: Present overview of agenda for 2½ days--state objectives of session as (1) team-building for Cadre and (2) strategizing for Cadre's future.
Materials: Newsprint charts
Time: 10 minutes

Step 2: Review of communication skills

Directions: Review communication skills of paraphrasing, perception checks, behavior description and description of feelings, describe the relationship between the four skills
Materials: Newsprint charts
Time: 15 minutes

Step 3: Come to the "Here and Now"

Directions: Have participants form pairs, or trios and conduct "Gunnysack Exercise."

Materials: "Gunnysack Exercise" from University Associates Handbook, 1973, p. 11

Time: 40 minutes

Step 4: Input about criteria for personal and group effectiveness

Directions: Present concepts of group effectiveness developed by Chris Argyris, Intervention Theory and Method: A Behavioral Science View in order to give Cadre some theoretical framework to guide and evaluate their group work.

Materials: Newsprint charts

Time: 30 minutes

Step 5: Sharing data generated in response to pre-session questionnaire

Directions: Group members in trios or pairs according to region, have each group prepare a composite report to Sections A and B of the questionnaire and individual reports to Section C.

Have outside consultant also prepare a report to the questionnaire.

Have groups and outside consultant report.

Materials: Pre-session Questionnaire of May 4, 1976 (A copy of the questionnaire is presented in Appendix C).

Time: 5 hours

Step 6: Introduce STP model and organize data

Directions: Present Fred Fosmire's Situation/Target/Proposal model for organizing information in a problem solving situation.

Lead group in a discussion of data reported helping them to organize and manage the information.

Record situation, target and proposal statements made by group on newsprint.

Materials: Newsprint

Time: 5 hours

Step 7: Presentation of "Pinch Model"

Directions: Present Sherwood and Glidewell's "Pinch Model" of planned renegotiation of expectations and commitments as relevant to problems facing Cadre.

Materials: *PETC-III*, Resource 20

Time: 10 minutes

Step 8: Survey of Cadre's perception of its organizational self

Directions: Survey group and record all responses to following questions: 1) Does the Cadre have the capacity to become an organization with functions needed to achieve its goals and can it determine the roles

needed to fulfill its required functions;
2) Do Cadre members want to do this?

Materials: Newsprint

Time: 30 minutes

Step 9: Identifying tasks to be performed

Directions: Have participants form pairs and generate an extensive list of tasks that must be done by the Cadre. Have pairs share these lists and prioritize tasks according to 1) those that must be worked on now, 2) those that must be worked on by September, and 3) those that can wait for attention at a later time.

Have the total group identify the three most important tasks that must be worked on today.

Time: 30 minutes

Step 10: Task Groups Work and Report

Directions: Form trios and have each trio select a task to perform and have trios prepare a report of their work.

Have trios report on their task and facilitate a discussion of each report.

The tasks were: 1) Agenda and issues for upcoming June and July business meetings, 2) Next year's funding and new membership, 3) Management of the Cadre and the role of the coordinator.

Time: 5 hours

July Session

Between the May session and the July session, telephone interviews were conducted with the Cadre members. When asked about their hopes and expectations for the July and August training sessions, their responses most consistently focused upon the desire for training and the building of trainer skills and techniques. Six of the seven persons interviewed indicated hopes and expectations that included exposure to theory and concepts, applications to case studies, or further practice in skill and techniques. With the priority given training by the participants, and the trainers' assessment of what were feasible objectives for the remaining sessions, the July session was designed to focus upon training the Cadre rather than strategizing for its future.

Several days before the July session the Cadre members received a packet of papers that were to be an integral part of the July training. A description of these papers is provided in Appendix C. The July training was characterized by heavy cognitive input and the application

of these learnings. The first two days were devoted to studying and discussing several concepts and models from the *PETC-II* system and using these concepts in critiquing a case study intervention. The remaining three days were spent in having teams prepare and conduct "select" sessions from *Interpersonal Influence, Interpersonal Communications,* and *PETC-I* exercises. These sessions were selected by the NWREL team because of their perceived relevance to the issues and problems facing the Cadre. Listed below are the situational statements, assumptions, goals, strategies and techniques that comprised the July training session.

July Design

Situational Statements

Since the Cadre's first meeting in August 1975, the group has received a series of four-hour training sessions on the following topics:

1. August 1975--Goal setting, planning and problem solving
2. September 1975--Communication skills, feedback, team building and group process
3. October 1975--Life training
4. November 1975--Organizational development models
5. December 1975--Process observation, group effectiveness models, feedback exercise
6. January 1976--Conflict management, interdependence organizational theory

In April and May 1976, NWREL offered the Cadre training in the use of diagnostic models for assessing skill needs, brief practicum in selecting, sequencing and conducting skill training exercises and facilitated the Cadre's increased awareness and understanding of planned renegotiation model by Sherwood and Glidewell as OD intervention.

The Cadre members have stated as one of their objectives to gain sufficient knowledge and skills to enable them to participate in consultant teams to client systems in the tri-county area during 1976-77 school year.

Our assumption is that members of the Cadre want to increase their theoretical understanding and their ability to practice consulting skills in teams.

Our impression is that the Cadre members are most ready to continue work on increasing consultant skills, particularly as they relate to the role of trainer which includes such skills as diagnosing and assessing skills, needs of clients, planning training strategies, conducting exercises, giving feedback to clients, etc.

Assumptions

1. Members of the Cadre aspire to provide consulting services to clients in the tri-county area.

2. At this time the Cadre's consulting services are chiefly training services.

3. Members of the Cadre intend to work together in consultant teams, therefore, need more training in what being a consultant means and what is involved in being a member of a team.

4. Members of the Cadre need a theoretical foundation for the consultant activities they engage in.

5. There is a need to establish a foundation of ideas, concepts as prerequisite for introduction to *PETC-III (Organizational Development)* concepts and skills projected for August meeting.

6. Members of the Cadre need to increase their training skills and capacity; designing, planning, diagnosing, theorizing, applying knowledge.

Goals

1. Provide trainees with an overview of consulting as described in *PETC-II*, especially theories, principles, consulting roles, dimensions.

2. Give major emphasis to the trainer role of the consultant.

3. Provide a theoretical foundation for the role of consultant.

4. Involve trainees in a practicum experience of consulting.

5. Link *PETC-I* diagnostic procedures to *PETC-II* activities, concepts, diagnostic and intervention matrices.

6. Increase trainees' awareness of issues involved in diagnosing and conducting training sessions.

Strategies

1. Adapt Part I of the *PETC-II: Consulting* training; include concepts, team formation, case analysis, planning to help another team, giving and receiving consultant help.

2. Provide a brief practicum to increase training skills, increase diagnostic skills, operationalize some of the concepts and principles presented.

3. Provide a general session during which the training staff and trainers have a conversation about issues relative to designing and conducting the training.

4. Help trainees to use the training, become more aware of information both about the Cadre and about what to look for in their client systems.

5. Provide minimum training in prerequisites to dealing with *PETC-II* issues and concepts.

Proposed Techniques

1. Read and discuss concepts, using the Cadre's situation and work with client systems as reference.

2. Form teams of three for training and consulting practice.

3. Study, analyze and produce an intervention strategy for a case study.

4. Plan for and give help to another team.

5. Ask for and receive help from another team.

6. Assign teams of trainers to prepare and conduct a trainer selected session from *Interpersonal Influence*, *Interpersonal Communications* or *PETC-I* exercises.

7. Include in the debriefing of trainee-conducted sessions and exercises diagnostic questions about what was learned with reference to future work with client systems and what information gained about the Cadre implies for feedback and additional steps the Cadre might take.

Techniques

Step 1: Overview and Objectives

Directions: Present overview, objectives, rationale. Clarify trainer behavior expectations.

Time: 30 minutes

Step 2: Making Agreements for this Meeting

Directions: Post 8½ x 11 sheets for each person. Distribute a set of 5½ x 8 sheets to each person. Tell them to reflect on their Personal Growth and Team Effectiveness questionnaires, then write 3 things in each column for each person, sign the sheets, then post them around the appropriate 8½ x 11 sheets.

When complete, tell each person to study their own cluster of lists and write on the 8½ x 11 sheet, in their own words, the items they agree to. Tell them to check with each other about what is meant by a particular item as they wish. Tell them to do nothing at this time with items they cannot agree with.

When all have finished have them sit together and discuss items they could not agree to and negotiate with each other about them.

Materials: 8½ x 11 sheet for each person posted -- 2 columns for each "do less" and "do more."

Sets of 5½ x 8 sheets, one for each person in group, for everyone. Each sheet headed with the name of a member of the group and containing same columns as 8½ x 11 sheets.

Chart with steps in the procedure.

Time: 2 hours

Step 3: Find the Consultant Exercise

Directions: Modify Paper 2, page 6 of *PETC-II*. Create two situations, one for each group. (Preparation 15 to 20 minutes; first role plan 10 minutes; second role plan 10 minutes).

Materials: *PETC-II*, page 1, step 2.

Time: 1 hour

Step 4: Form Consulting/Training Teams

Directions: Reinforce objectives of training. Help identify criteria for forming teams.

Time: 10 minutes

Step 5: Introduce Matrices and Link with *PETC-I*

Directions: Input on matrices. Reinforce rationale/objective of diagnosing skill needs tools for consulting.

Materials: *PETC-II*, page 3, step 5.

Time: 15 minutes

Step 6: Central Ideas

Directions: Ask them to read Paper 9, pages 17-47, using Paper 10 as a guide.

Materials: *PETC-II*, page 3, step 6; Paper 9, pages 17-47, Paper 10.

Time: 30 minutes

Step 7: Team Discussion

Directions: Ask teams to discuss Central Ideas -- use Paper 10. Individually answer questions in Paper 10 and discuss in teams.

Materials: *PETC-II*, page 3, step 6, Paper 9; pages 17-47, Paper 10.

Time: 1 hour

Step 8: Read Paper 13

Directions: Ask them to read Paper 13.

Materials: Page 81, step 3, Paper 13.

Time: 40 minutes

Step 9: Team Response to Case No. 2

Directions: Review page 83, definitions. Assign case, Paper 15. Ask them to use Paper 14 to respond and refer to Paper 9 for help and Paper 16.

Materials: *PETC-II*, Paper 9, 13, 14, 15 and 16.

Time: 90 minutes

Step 10: Group Discussion of Case Response

Directions: Ask them to share their work. Identify differences in responses. Account for them. Challenge assumptions in light of criteria provided by matrices.

Materials: Same as Step 9.

Time: 90 minutes

Step 11: Assessing/Diagnosing Consultant Skills

Directions: Ask them to read Papers 18 and 19. Produce answer to "what is consulting?" "What does a consultant do?"

Check Personal Growth dimension; check consultant skills P-21; produce on P-23 a summary of own skill needs as a consultant.

Materials: *PETC-II*, page 115, steps 2-7, Paper 20, Paper 21.

Time: 45 minutes

Step 12: Team Preparation to Ask for Help

Directions: Use Paper 23 as basis. Use Paper 25 as basis. Prepare request on Paper 26.

Materials: *PETC-II* Session 4: page 149, step 5, Paper 27, Paper 9, Session 5: step 2, Paper 20.

Time: 45 minutes

Step 13: Teams Plan to Give Help and Provide Consultation to Other Teams

Directions: Use Paper 27 for instructions about planning. Make reference to Paper 9. Each team 20 minutes, 10 minutes for critique.

Materials: *PETC-II*, Session 4: page 149, step 5, Paper 27, Paper 9, Session 5: step 2, Paper 30

Time: 3 hours

Step 14: Change of Pace Evaluation Feedback; Staff Fishbowl Assignments for Next Day

Directions: Conduct evaluation feedback. Conduct fishbowl interacting with outside consultant regarding goals, assumptions, intervention case study as per criteria.

Time: 90 minutes

Step 15: Preparation for Practicum

Directions: Have teams study materials and prepare to conduct exercise.

Time: 6 hours

Step 16: Conducting Activities

Directions: Have teams conduct exercises.

Time: 12 hours

Step 17: Integrating Learnings

Directions: Share situational statements, assumptions, goals, strategies and techniques used by NWREL team in July and lead group in a critique of the design.

Time: 1 hour

Step 18: General Debriefing and Evaluation

Directions: Have participants discuss where they are and share plans for next session.

Time: 1 hour

August Session

As the NWREL team began to plan for the final five days of training, concern for how to best assist the Cadre in preparing for the realities of the upcoming year in the brief remaining time was paramount. We were aware that several issues about the legitimacy, authorization, functioning and productivity of the Cadre were still unresolved and in need of attention. We were also aware that the impact of the training and consultation was being blunted by the "unreality" of the Cadre's situation. Up to now the Cadre's work and training had been conducted essentially in a vacuum. Few members had had the opportunity to carry on active work with a client system and of those that had, this was often under the direction of an experienced outside consultant. Because of this buffered contact with the realities of the external world, the relevancy and vitality of the training and consultation provided by NWREL suffered.

In an effort to overcome the problem of training a group in a "vacuum" with no ongoing practicum experience, the NWREL team proposed to have the Cadre select and recruit outsiders who would serve as a temporary client system. This was accomplished and a group of 14 teachers and teacher aides from surrounding schools was recruited to attend a one-day workshop. This workshop and the preparation for it comprised most of the August training.

One other event was critical to the context of the August training. The evening before the August training the Cadre held a business meeting. At this meeting a plan for the management and coordination of the Cadre was discussed and approved. This plan identified the Director of the Cadre with tasks and responsibilities to include management of the budget, reports to county and district agencies, and evaluation of the Cadre's activities along with general public relations activities. The Coordinator of the Cadre was selected with tasks which included working with the Director in preparing reports, approving budget expenditures, and coordinating the activities of Cadre members. An external consultant was designated whose responsibilities included training and technical assistance. The specifics of these tasks were to be negotiated. Additionally, the issues of the goals and objectives of the Cadre, the plan for the year's activities and meetings, the expectations concerning new members and the projected work with client systems was also discussed. In sum, the Cadre held a productive, problem-oriented meeting in which several unresolved issues and needs were raised and identified just prior to the August training.

Within this context the NWREL team prepared for the final five days of training. Below are the situational statements, assumptions, goals, strategies and techniques that comprised the August training.

August Design

Situational Statements

These are the last five days of training contracted between NWREL and the Cadre. The Director was not present during the July training meeting and will be present in August. The Cadre will have had a business meeting the evening prior to beginning the August training. At that time, the Cadre will have heard a report of conversations between the Director, Coordinator and outside consultant. Data will have been processed and decisions made.

The Cadre members have made statements about the degree to which they can and want to be involved in the Cadre. The trainers are concerned about the lack of explicit considerations given to the various levels of skills and competence among the members.

The Cadre members have had very little opportunity to have practicum experience. The trainers are concerned about the larger emphasis the training has had on the internal processes of the Cadre and a lesser emphasis on actual work with client systems.

The questions of legitimacy, authorization and the place of the Cadre in the organizational structure of the counties remains unclear and precarious. The Cadre had not engaged in strategizing about these areas. The Cadre does not seem to have a sense for strategizing.

It appears that the Cadre is keeping the Director's dream alive.

Organizationally, the group seems to be floundering.

At the moment, it appears that the group exists because of two main reasons: (1) there is a very strong affiliation among the members of the Cadre, being a member of this group is very significant to members; and (2) there are resources to the extent of $3600 for 1976-77.

Assumptions

1. Members of the Cadre need to become explicit about their levels of skills.

2. Members find it difficult to become explicit about their levels of skills.

3. They want to increase their skills.

4. All members can provide training services.

5. Some members can provide other consulting services in addition to training.

6. As a group, the Cadre is not clear about whether they want to be a professional group or an affiliative group.

7. The Cadre needs a practicum experience.

8. Coming to the end of the training agreement with NWREL, the Cadre needs time for self-assessment, integration of learnings, and projection for the future.

9. Members want to continue functioning as a cadre organization. It will be necessary for the Cadre to seriously look at its motivations for existing, to seriously identify its professional goals, and radically revise its procedures for getting decisions made.

10. The Cadre needs to give consideration to issues of viable structure as a group or cadre, accountability, feasibility.

Goals

1. To help them confront each other with their levels of skills.

2. To help them assess where they are with reference to their skills and their self-concept as trainers and consultants.

3. To help them plan, conduct and evaluate a one-day workshop.

4. To help them evaluate the training provided by NWREL.

5. To help them clarify what directions they want for the future.

Strategies

1. To increase their awareness of where they are, how they see themselves as trainers and consultants.

2. To experience a practicum experience of a one-day workshop to review, reinforce the applications of knowledge and skills acquired during the training.

3. To evaluate and debrief the total training experience.

Techniques

Step 1: Present Overview and Objectives

Directions: Present and discuss Boman's model for planning an intervention along with the specific planning documents for this session.

Materials: Planning documents: situational statements, assumptions, goals, strategies, etc., presented earlier.

Time: 45 minutes

Step 2: Collect Data from Myself and Others about My Consulting Self

Directions: Have participants work through Procedure 17, with following modification: substitute "My Skills as a Consultant" for "My Maturity as a Consultant." Use Resource 112 in step 3 of activity.

Materials: *PETC-III*, Procedure 17, Resource 112

Time: 3½ hours

Step 3: Giving and Receiving Feedback about My Consulting Self

Directions: Have participants work through Procedure 18.

Materials: *PETC-III*, Procedure 18, Resource 118

Time: 2½ hours

Step 4: Team Formation

Directions: Have participants form teams of two using the following procedure:

1. Any individual can nominate a team of two
2. Reasons for the teaming must be given
3. The reasons should focus on strengths and weaknesses, similarities and differences of members
4. The entire group must be satisfied with the team arrangements before proceeding

Time: 2 hours

Step 5: Planning, Designing, Conducting and Evaluating a One-Day Workshop

Directions: Have teams participate in Procedure 24, as outlined on pages 70-71.

Materials: *PETC-III*, Procedure 24

Time: 3½ days

Step 6: Evaluation and Future

Directions: Have participants represent their reactions to the 17 days of training by preparing a mural symbolizing the last six months of involvement. Debrief the mural and discuss implications for the future. Share our recommendations and strategy for the Cadre's future.

Procedure 24: Designing a One-Day Workshop

Here are the steps we will follow to arrive at a play for the workshop on Thursday.

Part I: Team Planning--allow the Universal Travel Agency to inform you.

Step 1. Retrieve information about the clients from the people who recruited them, from which you will derive your SITUATION statement.

Step 2. Write your SITUATION.

Step 3. Determine and write your GOALS (what you hope to accomplish) and your ASSUMPTIONS (what you believe about yourself and your clients).

Step 4. Based on your SITUATION, GOALS and ASSUMPTIONS, identify your STRATEGIES (large plans, such as "set goals," "identify problems," "practice communication skills").

Step 5. Using all the work you have done so far, MAKE A PLAN FOR THE WORKSHOP. Plan for a 9 am to 4 pm schedule, including a lunch break and others if you wish. The plan should indicate the TECHNIQUES (specific methodology) you plan to use to implement your strategies, for example, setting goals by the Delphi methodology, identify problems by using the Problem Analysis Program, practice communication skills by conducting a perception checking exercise.

Step 6. Prepare to report your plan. Use chart paper.

Part II: Selecting A Plan--the plan for the workshop will be determined by the following process:

Step 1. Each team will report the work it did in Part I, clarifying as needed.

Step 2. The whole group will then make a decision about the plan for the workshop. Options include:

Select one plan

Combine parts of two or more plans

Use the work done by the teams to produce a new plan

Step 3. Finalize the plan to include:

Situation	Strategies
Goals	Techniques
Assumptions	Sequence

Part III: Staffing the Workshop--determining two staffs, one to conduct the workshop and one to evaluate the workshop.

Step 1. Determine criteria for deciding who will conduct the workshop and who will plan and conduct the evaluation of the workshop. Please do not include volunteering as one of your criteria.

Step 2. Agree upon the two staffs.

Part IV: Staff Work for Preparing to implement the workshop plan. During this time the following should occur:

Step 1. Workshop Staff. Pay attention to *PETC-I*, Paper 19. Work out all details of the event, including assigning responsibilities, doing charting, practicing giving instructions, making necessary arrangements for breaks, lunch, etc.

Step 2. Evaluation Staff. Determine evaluation questions to be answered, decide the techniques by which the questions will be answered, design and prepare any instruements you wish to use, consult with the Workshop Staff about when you will collect information you may want from the participants, PLAN AND BE READY TO CONDUCT an Evaluation Session on Friday morning-- 9 am to 11 am. NWREL staff will assist you with these tasks.

Summary

Throughout the four training sessions the intervention team used many *PETC* materials and strategies, particularly those from *PETC-II*. However, the use of *PETC* materials was of secondary importance because the trainers were continually concerned with the client, what they said they needed and wanted, compared to the trainers perceptions of what they needed. The following questions were foremost during designing and training sessions:

Who are these people?

Why do they want this training?

Do they have all the information they need about themselves and their environment?

Are they in touch with the reality of the constraints and limitations that they face?

Is there any connection between what they say they want and the reality of their environment?

How can we respond to them?

Will our resources be compatible with their needs and reality?

Will they perceive us as having resources compatible with their needs and reality?

With these concerns in mind the trainers used the *PETC* materials when they found them to be appropriate. On several occasions the materials were modified and adapted to the requirements of the situation. On these occasions the trainer's knowledge and experience with the *PETC* systems was indispensable. In all, however, the *PETC* systems proved to be a rich collection of resources.

CHAPTER 4: TRAINING OUTCOMES

The purpose of this chapter is to describe the evidence pertaining to the evaluation question concerning immediate outcomes. In the following four sections, information is presented regarding (1) the reactions of the participants to the training and their perceptions of its utility, relevance and appropriateness, (2) the participants acquisition of knowledge and skills, (3) changes in individual member's attitudes, (4) changes in the norms, procedures and abilities of the cadre. A concluding section summarizes these findings.

In most instances, the data in these sections are reported for the total population. Emphasis has been placed on descriptive data. However, where appropriate, statistical differences have been calculated and reported.

REACTIONS TO TRAINING

The evaluators had three separate activities for gathering information from cadre members as to their perception of and reactions to the training experience:

1. A telephone interview was conducted with each member in early June. Two questions in the interview asked participants to comment on the materials and design used in the April and May training sessions and to remark on the style and behavior of the trainers. The complete interview schedule can be found in Appendix D.

2. In-person interviews were held with cadre members in mid-September, one month following the final training session. Among the questions asked were two concerning how participant pre-training expectations had been fulfilled and what suggestions and recommendations members had for the training process. This interview schedule is included in Appendix D.

3. A Final Questionnaire was administered to participants at the time of the September interviews. One series of questions asked cadre members for their perceptions of the relevance and utility of the training and its appropriateness as a learning experience, the clarity of the content in conceptualization and presentation, the efficiency with which the training time was used, and the degree to which the training met their pre-training expectations. This instrument may also be found in Appendix D of this report.

These varied methods of data collection provided the evaluators with information of a descriptive nature about the participants' reactions to the training. In the following section, a synthesis of the interview responses will be reported. The questionnaire data are then presented in Tables 4-7 with accompanying analysis.

Cadre members generally considered the structure and design of the training to be satisfactory and beneficial. The learner-motivated approach of the ITCP training systems which influenced the entire design was appreciated as was the orientation of preparing cadre members to be skills trainers first and process consultants second. There was special satisfaction expressed with those activities in the design that organized their energy and resulted in tangible products. Examples given included the task forces in the May session, the one-day practicum workshop cadre members developed and implemented during the August session, and the mural activity on August's final day. Several persons commented on the "non-training" activities in the design--e.g., the contract renegotiation on the first morning of the April training and the great bulk of the May session being spent on working through the cadre's internal issues--as depriving them of actual training and a less than optimum use of the trainer's resources. There was, however, a feeling of ambivalence evident in their remarks on these activities. Statements expressing resentment or dissatisfaction that training time had been

used for dealing with internal affairs were invariably accompanied by remarks that the process consultation provided by the trainers, particularly during the May session, had been critical and much needed and that the success of the July and August training sessions was due in part to these internal issues having been aired.

The *PETC* materials met with resounding acclamation. Praise was directed specifically at the ability of the structured experience to facilitate learning, the ease of handling for fledgling skills trainers, and the clarification of organizational development and process consulting theory in the concept papers and theoretical models. Several misgivings were raised, however. The dark side of the structure of the *PETC* materials is the sense of rigidity they may impose. Those few people who remarked on this indicated that the potential rigidity was countered by the flexibility which the trainers brought to their handling of the materials. There was some feeling that the *PETC* materials in April were slow in revealing their direction and intent. Other persons commented on non-accurate expectations being set on the nature of the *PETC-I* activities used during that session. Although directed towards the materials, these comments are as much a reflection on the training design as on the training materials. The trainers launching into *PETC-I* activities immediately after a temporary breakdown in the entry phase of the relationship may have been the cause for the various feelings of apprehension, distrust, and lack of understanding that some cadre members recalled feeling towards the training materials. A final comment related to the materials came from three participants who believed they would have benefited more greatly if they had had the prerequisite skills and knowledge recommended for the *PETC* systems and had experienced

the full *PETC* training rather than the severely truncated forms they were provided.

In Tables 4, 5, and 6 are presented the data gathered from the previously mentioned items on the Final Questionnaire. Two forms of anchored-rating scales were used in this section of the questionnaire: a six-point scale with labels indicating the high and low extremes, e.g., the training "offered new insights, new ways of viewing old problems" (high-6) versus "only restated or proved what I already know" (low-1); and a five-point scale with each point labeled, i.e., 5-excellent, 4-good, 3-satisfactory, 2-barely adequate, 1-unsatisfactory. For the purpose of data analysis and reporting, responses of 5 or 6 on the 6-point scale were considered positive; a 4-good or 5-excellent response was viewed as a positive response on the 5-point scale.

Several questions addressed the general area of relevance and utility of the training (see Table 4). Specifically, three questions were concerned with the importance of the content issues of the training, its parsimony, and the content's relevance to learning to be a skills trainer. The response to these questions was quite affirmative with 86% positive response to the first two questions and all participants responding positively to the question on relevance. There were widely varying responses to the two questions on new insights. Whereas there was a unanimous positive response to the general question on new insights offered by the training, the question on new insights gained on personal consulting style received only 43% positive response. Cadre members appear to have affirmed the appropriateness and practical usefulness of the training to learning to be a skills trainer with a positive response of 86% on appropriateness and 100% on usefulness.

Table 4

Participants Perception of Relevance and Utility of the Training

Question[1] N=7		Low 1	2	Scale 3	4	5	High 6	Total $\bar{X}$	S.D.
Question 30[2] Spoke to important issues, vital concerns (High) vs. Missed the important issues, vital concerns (Low)									
	N	0	0	0	1	3	3	5.29	.756
	C%	100	100	100	100	86	43		
Question 38[3] Parsimony (little or no importance or not useful material)									
Excellent (High)	-5								
Good	-4								
Satisfactory	-3								
Barely Adequate	-2								
Unsatisfactory (Low)	-1								
	N	0	0	1	3	3	-	4.29	.756
	C%	100	100	100	86	43	-		
Question 36[3] Relevance for learning to be a skills trainer									
Excellent (High)	-5								
Good	-4								
Satisfactory	-3								
Barely Adequate	-2								
Unsatisfactory (Low)	-1								
	N	0	0	0	1	6	-	4.86	.378
	C%	100	100	100	100	86	-		

[1]Questions 29, 30, 32 and 34 used a 6-point anchored-rating scale with labels for the high and low extremes. Questions 36, 38, 39, 40 and 41 used a 5-point scale with each response-option labeled. On the questions using the 6-point scale, responses of a 5 or 6 were considered a positive response for purpose of analysis; on the 5-point scale, responses of 5-excellent and 4-good were considered positive.

[2]Questions 29, 30, 32 and 34: "Think for a moment about the informational materials, practice exercises and methods used during the training. All in all, how would you rate them?"

[3]Questions 36, 38 and 39: "Please rate the content of the training: skills, concepts, principles and values for:"

C% = Cumulative Percent

Table 4 Continued - 2

Question N=7		Low 1	2	Scale 3	4	5	High 6	Total $\bar{X}$	S.D.
Question 29[2] Offered new insights, new ways of viewing old problems (High) vs. Only restated or proved what I already know (Low)	N	0	0	0	0	4	3	5.43	.534
	C%	100	100	100	100	100	43		
Question 34[2] Gained new insights about my style of consulting (High) vs. Learned nothing new about my style of consulting (Low)	N	0	0	0	4	1	2	4.71	.951
	C%	100	100	100	100	43	29		
Question 40[4] Practical usefulness in learning to be a skills trainer	N	0	0	1	1	5	-	4.57	.787
	C%	100	100	100	86	71	-		
Question 41[4] Practical usefulness in learning training skills	N	0	0	0	1	6	-	4.86	.378
	C%	100	100	100	100	86			

Excellent (High) -5
Good -4
Satisfactory -3
Barely Adequate -2
Unsatisfactory (Low) -1

[4]Questions 40 and 41: "Please rate the methods/strategies/procedures used during the training for:"

C% = Cumulative Percent

Table 4 Continued - 3

Question N=7		Low 1	2	3	Scale 4	5	High 6	Total $\bar{X}$	S.D.
Question 32[2] Provided real "how to" help for my actual group work (High) vs. Little "how to" help for my actual group work (Low)	N	0	0	0	1	4	2	5.14	.690
	C%	100	100	100	100	86	29		
Question 39[3] Practical significance for successful skills training									
Excellent (High) -5									
Good -4									
Satisfactory -3									
Barely Adequate -2									
Unsatisfactory -1									
	N	0	0	0	1	6	-	4.86	.378
	C%	100	100	100	100	86			

A similarly high opinion was held of the utility of the training with an 86% positive response to the question on gaining "how to" help for group work and a unanimous positive response on the issue of practical significance for successful skills training. It appears then that the members of the Cadre believe that the NWREL training was quite successful at meeting their needs and providing them with relevant and useful skills and knowledge.

Three questions were directed towards the clarity of the materials and their presentation by the trainers, and the appropriateness of the training for the Cadre members' level of experience and understanding (see Table 5). A unanimous positive response was received by the latter two questions. However, the participants experienced some difficulty with the language of the written materials with only 43% believing them to be "clear, concise and understandable."

A single question at the beginning of this section of the Final Questionnaire asked the participants to what extent the training had matched their pre-training expectations. Eighty-six percent of the responses were positive (see Table 6).

KNOWLEDGE AND SKILLS

One major focus of the Northwest Regional Educational Laboratory training with the cadre was to assist in the establishment of a cadre of educational training consultants. The optimum method of evaluating this aspect of the training would be to view the impact the cadre has in the tri-county area and the success of its interaction with client groups. However, the lack of time and funding in the Improving Teaching Competencies Program's contract and the pure methodological difficulties inherent in such a venture prohibited this type of study taking place.

Table 5

Participant Perception of Clarity of Content and Presentation

Question[1] N=7		Low Scale High 1	2	3	4	5	6	Total $\bar{X}$	S.D.
Question 31[2] Clear, concise, understandable (High) vs. Hard to understand, complex, full of jargon (Low)									
	N	0	0	2	2	1	2	4.43	1.272
	C%	100	100	100	71	43	29		
Question 37[3] Clarity of presentation and definition									
Excellent (High) -5									
Good -4									
Satisfactory -3									
Barely Adequate -2									
Unsatisfactory (Low) -1									
	N	0	0	0	3	4	-	4.57	.534
	C%	100	100	100	100	57	-		
Question 35[3] Appropriateness for your experience and understanding									
Excellent (High) -5									
Good -4									
Satisfactory -3									
Barely Adequate -2									
Unsatisfactory (Low) -1									
	N	0	0	0	4	3	-	4.43	.534
	C%	100	100	100	100	43	-		

[1]Question 31 used a 6-point anchored-rating scale with labels for the high and low extremes. Questions 35 and 37 used a 5-point scale with each response-option labeled. On the questions using the 6-point scale, responses of a 5 or 6 were considered a positive response for purpose of analysis; on the 5-point scale, responses of 5-excellent and 4-good were considered positive.

[2]Question 31: "Think for a moment about the informational materials, practice exercises and methods used during the training. All in all, how would you rate them?"

[3]Questions 35 and 37: "Please rate the content of the training: skills, concepts, principles and values for:"

C% = Cumulative Percent

Table 6

Degree to Which Training Met Participant Expectations

Question	Low Scale High 1	2	3	4	5	6	Total $\bar{X}$	S.D.
Question 28: To what extent has this training fulfilled your expectations about what you personally might get out of it? Has exceeded my expectations (High) vs. Has not come up to my expectations (Low)								
N	0	0	0	1	5	1	5.00	.577
C%	100	100	100	100	86	14		

In lieu of the desirable, the evaluators have fallen back on looking at the building blocks of the educational training consultants' trade: knowledge of organization and group theory, and interpersonal and trainer/consultant skills. It should be noted that the evaluators believe the success of an educational training consultant to be a function of much more than a sum of his/her knowledge and skills. The reader may wish to keep this thought in mind while pursuing the results of knowledge and skill evaluation activities presented in this section.

Three types of evaluation activities were undertaken to gather information in the areas of knowledge and skill gain.

1. Questions on the June and September interview schedule asked Cadre members about their perception of learnings in the areas of organizational development and group process theory and interpersonal and consultant/trainer skills.

2. A series of matching items on the Final Questionnaire tested for comprehension of *PETC-II* and *PETC-III* theoretical concepts.

3. A self-assessment form on various skills and abilities of a *PETC-I* skills trainer was administered to cadre members at the end of the first training session in April and again as part of the Final Questionnaire in September.

Interviews

In studying the responses to the June interview, which used an open-ended question format, it is evident that, although individuals perceived themselves as learning from the training, there was little congruence amongst cadre members as to what each member was gaining knowledge about. The interview revealed participant awareness of learnings in the following areas:

1. Problem identification (force field analysis)
2. Facility in working in groups; personal style
3. Awareness of the scope of organizational development
4. Group dynamics and group process skills
5. Trainer/consultant behaviors
6. Interpersonal sensitivity and responsiveness

No more than two interviewees indicated learnings in any one area. At this point in the training, learnings were concentrated in the areas of understanding group dynamics and awareness of one's own and other's behavior in groups. This was quite possibly due to much of the training (the last day of April and nearly all of May) being spent looking at their own group process.

The post-training interview asked cadre members specifically about learnings in the following areas: consultant/trainer skills, interpersonal skills, ability to team with others in consulting/training role, and organizational development and group process concepts and theory. In the first area, all participants believed they had learned a great deal, particularly in the area of diagnosing group dynamics and process skill needs. Other skill areas mentioned were all related to *PETC-I* skills trainers activities, e.g., selecting, sequencing, adapting and conducting skills exercises.

The question on learnings of interpersonal skills received a less enthusiastic response. Two Cadre members considered themselves to have been already proficient in such skills before the training started. The remaining members perceived an increase in their interpersonal skills and an accompanying increased effectiveness in their working in groups, as peer or leader. A reflection on the state of one's interpersonal skills can be found in his/her ability to team effectively with others in a trainer/consultant role. The interview item querying an increase in such an ability received unanimous affirmative response. Three people couched their statements in terms of now being better aware of whom they can and cannot team with effectively and the interpersonal weaknesses of some teams of Cadre members.

There was a more mixed reaction to the item on increased understanding of theory. Five interviewees stated that they did believe a clarification and broadening of their understanding of organizational development and group process theory had occurred. The three remaining respondents to this item were less sure of how their cognitive learnings had increased; they knew they had been exposed to much new theory and concepts, but they had never had to recall it or apply their theoretical learnings and therefore did not "know" what or how much they had learned. These last responses are easily understandable when viewed in the context of the training. Most of the theoretical input had been in the areas of consulting and organizational development, the realms of *PETC-II* and *PETC-III*. However, quite nearly all of the practice and application had been along the lines of a *PETC-I* skills trainer which contains a much narrower theory base. Moreover, the NWREL training with the Cadre was much more experience-based than it was cognitive-oriented. Theory papers were distributed, but given little in-training

attention; there were few activities of the "class discussion" nature. Thus, to expect important cognitive gains in the theory of organizational development and consulting is, in many aspects, unwarranted.

Final Questionnaire

The issues raised in the previous paragraph received some statistical input from the results of the series of matching items on the Final Questionnaire. The ten items were labels of terms that were used during the training. A list of 18 descriptions was presented from which the participants chose one or more appropriate phrases for each of the ten terms. Since four of the items had two or three correct answers and each correct answer was given a score of one point, there was a possible total correct score of 17 points. The data is presented in Table 7.

The scores for the seven participants ranged from a low of 4 to a high score of 11. The median score was 4.5 correct answers. When looking at responses to a specific item, it is evident that the Cadre members had the greatest success with the first three terms. These terms--Phases of the Consulting Relationship, Differential Diagnostic Matrix, Differential Intervention Matrix--represent the key theoretical models of the *PETC* training system and were identified correctly by all participants, with the exception of the diagnostic matrix for which one person failed to find an appropriate match. Of the remaining seven items, only one was correctly matched by more than half of the participants, although every item was correctly identified by at least two respondents.

Here we have a test of the members' comprehension of organizational development and consulting theory on a purely cognitive basis and we find them, as a group, rather poorly informed. There are

TABLE 7

Participant Scores on Matching Item
Subsection of Final Questionnaire

Item	Persons N=7 A	B	C	D	E	F	G	Number of People Answering Correctly	Number of Correct Answers
18. Phases of Consulting Relationship	1	1	2	1	1	1	1	7	8
19. Differential Diagnostic Matrix	1	1	2	1	1	2	-	6	8
20. Differential Invervention Matrix	1	1	1	1	1	1	1	7	7
21. Functions	1	-	-	1	-	1	-	3	3
22. Operational Characteristics	-	-	-	-	1	1	-	2	2
23. Processes for Designing Interventions	-	-	1	-	1	1	-	3	3
24. Possible Consultant Roles	-	-	-	1	1	-	1	3	3
25. Intervention Strategies	-	-	-	-	1	1	-	2	2
26. Intervention Techniques	1	1	-	-	1	1	-	4	4
27. Bolman's Model for Intervention	-	-	1	-	-	2	1	3	4
Total score per person	5	4	7	5	8	11	4		

several factors which may have influenced this relatively poor showing. The first refers back to the final comments in the interview section. The ten matching items deal exclusively with theoretical models and tools used in the *PETC-II* and *PETC-III* training systems whereas the focus of the training and the inclination of the participants was more experience based and emphasized skill learning rather than knowledge acquisition. It is doubtful that participant integration of the *PETC-II* and *PETC-III* concepts through practice and application has occurred at this time.

Other factors that may be involved here concern the nature of the instrument used to measure cognitive knowledge. The language used in the descriptions and phrases to be matched with the terms, though taken directly from the Theory Papers, was quite general and abstract. For only four of the items were there descriptions that contained concrete, specific statements. Three of these items were the previously mentioned theoretical models which were most often correctly identified. The lack of an explicit statement in the instructions telling respondents to indicate all appropriate matches for a particular item may have also been a factor. Only three of the seven cadre members gave more than one response per item.

Self-Assessment

A third method for measuring some aspect of the skills and knowledge gained from the training was the administering of a self-assessment form to the Cadre members at the conclusion of the first training session and again following the fourth and final training meeting. The form used a 5-point anchored-rating scale with each point labeled, ranging from "1--unqualified, lacking in skill" to "5--superior competent, expert."

A comparison of pre- and post-test mean ratings for each item was undertaken by means of a t-test.

As can be seen in the data presented in Table 8, there were statistically significant gains for ten of the thirteen items. The only areas in which Cadre members did not, as a group, perceive a significant change in themselves were the knowing and use of communication skills, an understanding of the difference between structured and unstructured training, and an understanding of diagnostic procedure. Although their understanding of diagnostic procedures may not have increased, their perception of their ability to undertake a diagnosis of individual and group process needs showed a statistically significant increase (.01) in all four areas queried: goal identification, communication techniques, problem solving and decision making. A statistically significant increase was also evident in the four skill areas related to group process skills exercises: selecting (.05), adapting (.01), sequencing (.01) and conducting (.05) skills training exercises. A third area to show a significant increase was that concerned with the consultant/client relationship: having a diagnostic orientation towards client needs vis-a-vis needs (.05) and maintenance of a client-centered orientation (.01).

INDIVIDUAL ATTITUDES AND OPINIONS

Throughout the intervention the Cadre members were frequently confronted with self-generated data about (1) the role of group process training in education, (2) the realities and feasibility of becoming internal educational training consultants and (3) the viability of using the Cadre as a vehicle to provide that service to districts and schools. Three questions were included in the final interview to inform

TABLE 8

Cadre Self-Assessments[1]

Item	N	Pre $\bar{X}$	S. D.	Post $\bar{X}$	S. D.	Change	T	P
1. Know and use basic communication skills appropriately, e.g., paraphrasing, perception check, behavior description and giving and receiving feedback.	7	3.43	.787	3.57	.976	+	.548	NS
2. Show an understanding of the difference between constructed process training designs of GPS workshop and unstructured process training, and can affirm the value of each.	6[2]	2.83	.753	2.92	.917	+	.307	NS
3. Understand diagnostic procedures and rationale.	7	2.57	.787	2.86	.627	+	1.082	NS
4. Have a diagnostic orientation toward client needs and self needs, and have clarity about the difference between client needs and self needs.	7	2.29	.951	3.21	.809	+	2.240	.05
5. Am capable of consistently using a client centered orientation and am able to state clearly a rationale for deviating from it and/or leveling with client about having no way to meet their needs.	7	2.00	1.000	3.50	.866	+	5.196	.01
6. Select skills training exercises.	7	2.43	.976	3.50	.646	+	3.041	.05
7. Adapt skills training exercises.	7	2.36	.627	3.36	.627	+	4.583	.01
8. Sequence skills training exercises.	7	2.29	.951	3.50	.646	+	3.545	.01
9. Conduct skills training exercises.	7	2.57	.787	3.64	.852	+	2.585	.05
10. Diagnosing individual and group process needs in the areas of:								
a. Goal identification	7	2.14	.900	2.93	.732	+	3.667	.01
b. Communication techniques	7	2.57	1.134	3.29	.567	+	3.333	.01
c. Problem solving	7	2.57	.787	3.21	.636	+	4.500	.01
d. Decision making	7	2.29	.951	3.14	.748	+	3.618	.01

[1]The rating scale used in this form was as follows:

0 = N.A., not able to rate
1 = Unqualified, lacking in skill
2 = Acquiring skill, needs improvement
3 = Basic competence, about average
4 = Very competent, above average
5 = Superior competence, expert

[2]One person used the "0" rating on her post rating and her data for this item thus could not be used in this analysis.

us about the Cadre members' views on these issues and assess the possible impact of the intervention on these attitudes.

Cadre members were asked if they "had made any reassessment of the need for or potential impact of OD and group process training in the tri-county area." Four of the ten interviewed indicated that no reassessment had occurred. They still believed OD training was needed and would have a powerful impact on the tri-county schools. Six members indicated that some reassessment had occurred. For example, three members said they were now even more aware of the need and possible impact of OD training. Three others said their view of the need and potential of OD training was more focused, more "reality based" and more substantive.

A second interview question asked members about any modification in their "goal of becoming internal educational training consultants." Half of the members said their goal had not changed and they were still interested in working as educational training consultants in the tri-county area. Four members indicated that some changes had occurred. Typically, these changes involved a refocusing of their consultant activities. Several mentioned placing a greater emphasis on skill training instead of providing on-going consultation to intact groups. Also, these members indicated they would "limit" their consulting activities to their own schools, districts or work groups rather than respond to requests made to the Cadre as a group. One member indicated that she no longer wanted to become an internal educational training consultant. As she had become aware of the requirements and pressures of the role of educational training consultant, she had decided the "job was not for her" and that she was better suited to help schools in other ways.

The third question addressed members' "commitment to the Cadre, their perceptions of their membership and the energy they were willing to invest in making the Cadre a reality." Four members said they had not perceived a change in their commitment to the Cadre. However, of these, one person had already limited the time and energy he could invest in the group. One member saw her investment and commitment increasing because she would be performing the role of coordinator for the Cadre. The remaining four members indicated a decrease in their commitment to the Cadre and their investment in making the Cadre a reality. Other commitments were cited for the reduction of interest in the Cadre. One member indicated his frustration and disappointment with the group because of its "social club atmosphere." He indicated that he was committed to the Cadre to the extent that it could "respond to and serve school systems" but that if the social club atmosphere continued, he would terminate his membership.

THE CADRE AS A GROUP

Earlier sections of this chapter focused primarily on perceived outcomes and changes that occurred with individual members of the cadre. Summarized in this section are the major changes that occurred in the Cadre as a group. That is, changes in the way the Cadre goes about its business, the dynamics and procedures of the group as well as changes in the group's ability to maintain itself and accomplish its objectives. The evaluators relied upon two methods in gathering data about these outcomes. Initially, information was gathered through detailed observations of the Cadre. Their process was documented during business meetings and during training activities, while working as a total group and while working in teams or small task groups. These observations

led the evaluators to believe that certain changes had occurred in the norms, procedures and abilities of the group. To further substantiate these beliefs, items were included in the final interview which produced information about the Cadre members' perception of the hypothesized changes. In this way, observation and interview data were used to assess changes in the Cadre's norms, procedures and abilities that appeared to result from the intervention.

The most apparent and probably most significant change occurring in the Cadre was the clarification and definition of the management structure. In March and April, when NWREL started consulting with the Cadre, there appeared to be no defined management structure. The Cadre functioned under the stated norm that "all members had an equal say" in the decisions of the group. While this norm was frequently and proudly cited as indicative of the group's superior process, the decisions made by the group were, in actuality, heavily influenced by a few members.

Besides being relatively unaware of the dynamics surrounding the decision making in the group, the members had turned over much of the group's coordinating tasks to an outside consultant. Thus, the consultant not only provided training and assistance but, in many cases, actually performed several vital tasks for the group. For example, maintaining contact between members from one meeting to another, recording and reporting on the activities of the group, seeking client systems and additional funding sources, finding meeting facilities and convening business meetings for the group were some of the management-coordination tasks performed by the consultant.

Therefore, when the NWREL staff started to consult with the Cadre, we were faced with a group that espoused equal participation and influence

but was characterized by differential participation and unequal distribution of power. We were dealing with a Cadre that said they wanted to become a productive, effective, self-renewing group of internal consultants in the tri-county area but that had abdicated much of the responsibility of managing itself and given most of its coordinating task to an external consultant.

During the intervention, several events occurred that resulted in changes in the group's awareness of its decision-making processes and influenced the emergence and definition of the management roles. In April, one of the work groups identified influence and decision making as internal problem areas in the Cadre and an exercise was conducted during which some of the discomfort members were feeling about these matters was raised. In May, the matters of influence and decision making became paramount as the group discussed the way its annual report had been prepared and the request for new funds had been managed. It was during this time that the initial ideas about the management structure were formulated. During July, a series of meetings were held between the Cadre's Director, a representative and the external consultant. From these meetings emerged the management structure under which the Cadre is functioning to date.

In brief the management structure designates three roles to be performed by Cadre members: That of Director, Coordinator and Representative. The Director's tasks include (1) managing the budget, (2) managing the reporting and linking to tri-county coop (the funding agency) and tri-county districts and schools, (3) public relations and (4) managing the evaluation of the Cadre's activities. The Coordinator's tasks include (1) representing the Cadre in decision making with the Director,

(2) linking between the Director, any consultants and the Cadre, (3) approving budget expenditures and program activities and (4) maintaining contact with Cadre representatives. The Representative's tasks include (1) meeting with the Director and Coordinator at three times during the year and (2) assisting the Coordinator in decisions that require immediate attention. Additionally, an external consultant was to be hired to work with the Director and Coordinator in planning and to provide training to Cadre members.

When asked about this clarification of the roles and responsibilities, all members agreed the change had been heavily influenced by the consultation provided by the NWREL team. All members viewed the change positively. Several indicated that the new structure would help the Cadre deal more effectively with its business, remove some of the ambiguity surrounding decisions and coordination and free the members to receive training and serve client systems. In sum, members believed the new structure would enhance the efficiency of the Cadre's performance.

One example of this increased efficiency may be found in the planning conducted by the Cadre following the withdrawal of the NWREL team. At the conclusion of the August training, the NWREL team presented a series of recommendations to the Cadre regarding their strategy and activities for the upcoming year. Following the August training session, the Coordinator and Director met to start planning for the year's activities. In conducting this planning, they relied upon a planning model that had been presented during the training--the Bolman model for "Planning an Intervention." (Found in the *PETC-III* material.)

The Coordinator and Director compiled a list of situational statements, assumptions and goals that described where they saw the

Cadre. This was accompanied with a list of suggested strategies and techniques for accomplishing the goals. This information was sent to all members with the request that additions and deletions be made and returned. Therefore, at the Cadre's September business meeting, the planning of the year's activities was expedited by the preparation and work performed by the management team. At this meeting, specific strategies and techniques were chosen and needs for additional information were identified. The stage was set for major planning decisions to be made at the upcoming October meeting. Unfortunately, several members were absent from the October meeting and the decisions regarding the year's activities were delayed until November.

It is important to note that while the management structure has improved the Cadre functioning, the group still had not selected an integrated set of activities for the upcoming year. Additionally, while a heightened awareness of the dynamics surrounding the group's decision making has been achieved--eight of the ten members believe this has occurred--at times the decision-making procedures are still cloudy and ambiguous. In all, however, Cadre members increased their understanding and awareness of their decision-making processes and the group itself was left with a more clearly defined set of roles and procedures for managing itself and coordinating its efforts.

A second set of changes that may be attributed to the NWREL interventions occurred in the way the Cadre conducted its meetings. A three-hour business meeting was conducted by the Cadre at the conclusion of the April training and documented by the evaluators. The meeting was well organized and reasonably productive. The members started with a very long list of discussion items, identified those

items that were most important, established time allotments for each item and then proceeded to work their way through the list. Specific members were assigned the role of convener, recorder, timekeeper and process observer. It was their responsibility to perform these functions during the meeting. However, in spite of this organization or more accurately, because of the organization, the meeting was characterized by a mechanical, highly disciplined discussion of the items. The meeting was conducted in an atmosphere of rapid and rigid dispatch which resulted in getting things done but also led to a sense of fatigue, to members sitting on feelings and opinions and to a lack of real dialogue on the topics.

Members of the Cadre assumed that only those persons assigned certain roles could perform the associated functions for the group. For example, members would ask the convener to "take a survey" rather than simply poll the group themselves. The process observer was expected to "report" at the end of the meeting rather than share observations during the meeting that might help the group with its work.

In addition, the communication skills of paraphrasing, perception checking and summarizing were infrequently used. Members would often make complicated statements of their opinions which would be followed by another's opinion. Frequently, questions were used to address the group and typically would go unanswered. Little effort was made to ensure the opportunity for all members to be heard. Thus, while the meeting was well organized and productive, the members appeared to be fatigued, frustrated and often dissatisfied with the way things had been done.

At the conclusion of the April business meeting, the intervention team gave the Cadre feedback on its process. The aforementioned characteristics were mentioned and the possibility of running a more relaxed meeting was discussed. This feedback session, combined with the opportunity to practice new meeting procedures during training activities, seemed to have been the critical event associated with the group's modification of the way it conducted its meetings.

In August, the evaluators had the opportunity to document another two-hour business meeting of the Cadre. This meeting also seemed to be well organized and productive but it was markedly different from the April meeting. Instead of a long list of specific items and their accompanying prioritization and time allotments, the group simply identified several issues that seemed pressing. One person was designated as the convener and another as the recorder and the discussion began. When one member asked about who was going to be the timekeeper and process observer and "weren't they going to assign discussion times to the items," he was answered by the comment, "We don't do that any more, we're only having 'get togethers' from now on. No more rigid business meetings!" And, in fact, the meeting was conducted in a very relaxed way. Individuals were afforded the opportunity to state their opinions and feelings. Attention was given to summarizing where the group was and identifying unfinished issues. Paraphrasing and perception checking were more apparent in April. Notably, the functions of convening, keeping time, and process observing were performed by several members at different points in the meeting, often in very appropriate and helpful ways. Even though this change in the way the Cadre conducted its meetings was not an objective of the intervention, it represents one outcome of the training and consultation provided by NWREL.

Three other salient aspects of the Cadre appeared to be modified by the NWREL intervention. First, the group's awareness of its various skills, competencies and resources appeared to be increased. Second, the Cadre members' ability to team together and effectively respond to a client was improved. Third, the Cadre's ability to diagnose its own internal problems and manage internal conflicts and process appeared to be enhanced.

When NWREL commenced the intervention with the Cadre, the Cadre verbalized the belief that all members were equally capable and all would participate equally in all aspects of the Cadre's work. However, unrealistic this norm was, the group often acted as if it were true.

In August, several hours were devoted to assessing the skills and competencies of individual members. By the conclusion of the training the group spoke more freely about the respective strengths and weaknesses of various members and individual abilities and styles were made more explicit. When asked about this, nine of the members believed the group had established a more realistic assessment of its skills, competencies and resources. One member reserved judgment saying he needed to experience working with other members to observe their performance before making an assessment of other's skills and competencies.

Along with an increased awareness of individual's abilities and skills, came an enhanced ability to team and work together. On several occasions during the training sessions members were given the opportunity to work together in various groups. This, combined with the team selection process used in the August training and the collaborative preparation of a workshop design, resulted in the members being more

able to form teams and work productively together. All members of the Cadre indicated that they believed their teaming ability had been improved by the training. Three members went on to say they believed more improvement could be attained in this ability and they were concerned that the group would not be able to maximally use its talents unless the teaming ability were improved further. All members agreed that the group's improved ability to team would lead to a great productivity and effectiveness on the part of the Cadre.

Finally, we speculated that the Cadre had increased its abilities to deal with its own internal problems, conflicts and processes. At different points in the training, various procedures and exercises were modified to focus on the internal problems of the Cadre. While these procedures and exercises were intended to train members in consultant skills, their modification enabled the group to use them in a self-reflexive way. Also, the trainers frequently made process observations, gave feedback and presented conceptual models and procedural techniques to enable the Cadre to better resolve some of its internal conflicts and problems. When asked if they believed the Cadre had increased its ability to deal with its own internal problems, conflicts and processes, five members answered affirmatively. Four members said they believed the ability had been improved but that more improvement was needed. One member indicated that the skills and knowledge available to the group were adequate but that the norms for being self-reflexive were not strong enough to enable the group to resolve its internal problems. One member was concerned that the group's ability in this area might become overused to the detriment of task accomplishment.

In all, Cadre members believed that the training provided by NWREL had resulted in an increase in their ability to solve their internal

problems, an improvement in their ability to team and work together and a more realistic assessment of their various skills, competencies and resources.

SUMMARY

This concluding section is intended to summarize the major findings described in the previous four sections of this chapter.

With respect to the reaction of the Cadre members to the NWREL training, it appears that the training was perceived as a valuable experience. The design seemed to meet their needs not only to receive training in consultant and trainer skills but also, at times, to facilitate their own group process. The only deficiency here was the trainings' relative lack of success in providing the Cadre members with some insights into their own consulting style. However, this may have resulted from the limited practical experience rather than from the design of the training. The training materials provided both enlightening experiences to them as trainees and eminently usable tools and resources for their own work as skills trainers and group process consultants. Some concern was expressed about the potential rigidity of the ITCP training systems and the possibly decreased benefits of receiving *PETC* training without having experienced the prerequisite ITCP training systems. There was comment too, on the complexity and relative lack of easy comprehensibility of the materials. In all, however, the participants reacted very favorably to the training provided by NWREL.

The assessment concerned with the knowledge and skills obtained from the training show rather mixed results. Through interviews with Cadre members, both during and following the training, and from a self-assessment form completed by the members at the conclusion of the training, it is

evident that they believe they have gained many consultant/trainer skills and a certain amount of knowledge in group process and organizational development theory. The self-assessment form showed statistically significant increases in their perceptions of their abilities in ten of thirteen aspects of the *PETC-I* skills trainer role and consultant orientation in the client relationship. The varying roles and behaviors of the *PETC-I* trainer received considerable mention in the interview as an area of learning as did, to a somewhat lesser extent, interpersonal skills. Concerning cognitive gains in group process concepts, organizational development theory, there were some doubts amongst the Cadre members about the amount or depth of learning having taken place. Their uncertainty about cognitive learnings seems to have been borne out by the results of a short cognitive test on *PETC-II* and *PETC-III* terms and concepts: out of a possible 17, scores ranged from 4 to 11 with a median score of 4.5. There were several factors that may have influenced the test results: the experience-based orientation of the training with little emphasis on cognitive knowledge, an apparent misdirection in the instructions for the test section of the instrument and the abstract language used in several of the test items.

As for the attitudes of the Cadre members concerning their role in the Cadre and the role of the Cadre in the public schools, it can be said that at the conclusion of the intervention, several members were more aware of the need for and potential of OD and group process training. Along with this awareness, came an emphasis upon skill training and a limiting of consultant activities to the work groups and schools to which individual members belonged. Additionally, there appeared to be a reduction in the commitment to the Cadre as a group and a decrease in

in the time and energy members would invest in establishing the Cadre as a viable group in the tri-county area.

The fourth section of this chapter reported outcomes and changes that occurred in the Cadre as perceived by the evaluators and the Cadre members. One easily observable outcome was the reordering of the Cadre's organizational structure to provide for greater representation in the management process and delineation of managerial duties. The decision-making process also underwent a face lifting although it remains somewhat ambiguous to several of the Cadre members. A further change has occurred in the methods the Cadre uses for conducting its business meetings. They have moved from an extremely rigid, timeclock process to a more informal exchange allowing for expression of feelings and greater participation by all. However, though these changes in structure and process have occurred and are viewed as having changed the Cadre's efficiency for the better, a fundamental flaw remains: decisions on action plans are seldom reached or carried out and members' activities as Cadre personnel, with the exception of those associated with business meetings, remain minimal with like impact on district schools.

The evaluators also observed, and had corroboration by the Cadre members, an increase in the frankness and accuracy of members' assessment of the various skills, competencies and resources which members brought to the group. This greater objectivity in resource assessment has resulted in a more efficient use of resources in the creation of training teams and the on-going process of working together as a group. Cadre members were less sure that there now existed an increased ability to deal with their own internal problems, conflicts and process. While the NWREL intervention resulted in many changes in the norms and processes

of the Cadre, it was evident that further consultation and work was needed to help establish the Cadre in the tri-county area and stabilize the group so that consultation services could be provided to district schools.

CHAPTER 5: CONCLUSIONS AND RECOMMENDATIONS

As indicated in the first chapter, the focus of this study differed markedly from previous field tests conducted by the Improving Teaching Competencies Program. The training and consultation described in this report required substantial modification and adaptation of the *PETC* instructional systems and it involved some attention and effort aimed at establishing a cadre of educational training consultants. Consequently, the focus of this study was on the adapting and tailoring of *PETC* strategies and materials and the use of these strategies and materials to assist in establishing a cadre within a specified region or district.

Given the context and focus of this study, the evaluation methods used throughout, placed a premium on observing, discovering and identifying critical aspects of the intervention that were associated with the adapting of the *PETC* systems and their use in establishing a cadre. In the earlier chapters of this report attention was given to (1) the context of the study--the history of OD efforts at the field site, the events leading to the beginning of a cadre of aspiring training consultants, and the goals, intents, and previous experiences of this group prior to the NWREL intervention; (2) the input of the study--the actual strategies, techniques and materials employed by the NWREL team along with the accompanying assumptions and rationale that comprised the intervention; and (3) the immediate outcomes of the study--the perceived changes in the attitudes, skills and knowledge of the participants as well as the changes in the norms, processes and procedures of the Cadre as a group. In this chapter a series of observations, suggestions and recommendations are presented that have been derived from our efforts to adapt the *PETC* systems and use of them as resources to train and establish a cadre of educational training consultants.

The suggestions and recommendations presented in this chapter are based upon observations and impressions of the intervention team and represent the considered opinions and reflections of the trainers and evaluators. These recommendations are not reported as empirically validated research findings, but rather as suggested hypotheses and principles that beg for further elaboration and study.

The recommendations of this study are organized around certain critical aspects of the intervention--aspects believed to have influenced the training and which require special consideration when undertaking an effort of this type. Four critical aspects are presented and discussed. They are (1) the lack of participants' experience with the *PETC* prerequisites (*IPC*, *INF*, *RUPS* and *SC&NPS*); (2) absence of a practicum experience either before or during the training; (3) the characteristics of the Cadre as an intact group; and (4) the salience of organizational issues in this kind of effort.

LACK OF PREREQUISITE EXPERIENCES

The three *PETC* instructional systems were originally conceived and developed with the assumption that participants would have a base of experience, knowledge and skills provided in the other instructional systems developed by ITCP, specifically, *IPC*, *INF*, *RUPS*, and *SC&NPS*. Descriptions of these systems are provided in Appendix A. In this intervention, the group receiving training had not experienced any of the prerequisite systems. They had experienced approximately 40 hours of group process training and had been exposed to a variety of concepts and theories associated with interpersonal communications, leadership, group dynamics and consultation. A detailed description of the training experienced by the Cadre prior to the NWREL intervention is provided in

Chapter 2. However, the training experience of the Cadre was considerably different in focus, content and intensity than the experience that results from taking the entire series of prerequisite systems.

This lack of experience in the prerequisite systems seemed to reduce the impact of the intervention in two major ways. First, it slowed the training on various occasions and appeared to reduce the amount of learning on the part of the participants. For example, the technique of force field analysis is an integral part of the *RUPS* system. However, when force field analysis was used as part of the *PETC-I* training in April, additional time was required to explain parts of the technique and some of the participants were required to grapple with a new problem solving technique as they proceeded through the training. Had the participants been better versed in force field analysis, the *PETC-I* training would have proceeded more smoothly and its impact would have been enhanced.

Second and more subtly, the lack of prerequisite experience led to occasional discrepancies between the participant's expectations and assumptions about the training and the requirements and assumptions underlying the training systems. The *PETC* systems, in fact all the ITCP instructional systems, are based upon a "do-look-learn" model and rely heavily upon experiential learning and active participation on the part of the trainees. If a person is not appreciative of this type of learning situation, resistance to the training and frustration with the experience may result. On occasion this kind of resistance and frustration was present. It would typically be displayed by the participants' apparent difficulty in starting a particular exercise or sequence and in their apparent difficulty in understanding the directions and requirements of the task. On other occasions, the participants would refer to

the "mystery" of the training experience and to the "magic" of the techniques as they would gain a particular insight or understanding. Two participants verbalized their frustration during the interviews and indicated their preference and desire for more lectures and direction from the trainers.

Even though there was some frustration and resistance on the part of the participants due to this type of discrepancy, its impact on the training was probably minimal. However, the lack of appreciation for the "do-look-learn" training model and its requirements of group participation and work did weaken the impact of the training in another way. Much of the *PETC* training required the participants to work in groups, either in pairs, trios or quartets. This work was often sequential and cumulative in nature, and required the presence of all members to have maximal impact. Unfortunately, for whatever reasons, many of the participants were unable to completely clear their schedule during the training days and the absence of one or another member was a constant disruption to various work groups and to the training as a whole. This kind of absenteeism is particularly detrimental when training an on-going work group like the Cadre. The amount of disruption caused by absenteeism and the eventual impact on the training is difficult to assess but it is sufficient to say that in this intervention the lack of appreciation for the laboratory training requirements of constant and on-going participation of all members disrupted the training sequence and reduced its impact on individual participants and especially on the group as a whole.

Therefore, we recommend that if consultants are using the *PETC* systems with participants that have not been "socialized" in the procedures of the "do-look-learn" model of laboratory training, they should

(1) prepare for some resistance to the training procedures early on in the training and (2) stress the importance of all members attending all training sessions so that work flow and the training sequence is not disrupted.

ABSENCE OF PRACTICUM EXPERIENCES

An integral part of the *PETC* instructional systems as they were originally developed is the concurrent preparation for and experience with a real client system. This is especially true of *PETC-I* and *PETC-II*. The participants are expected to be engaged in the real issues and problems of an actual consultant relationship. It is the application of the *PETC* concepts and strategies to the real issues of a consultant relationship from which the major learnings are derived. Unfortunately, we were unable to involve the participants of this study with actual client systems. In fact, several of the participants had had only limited experience with client systems. Of those that had some field experience from which to draw, the experience had typically been of short duration, limited intensity and under the guidance of an experienced external consultant.

This lack of practical experience, especially the lack of a concurrent consulting experience, greatly reduced the impact of the training systems. This factor, probably more than any other, diminished the relevance of the training, weakened the power of the systems and lessened the acquisition of knowledge and skills on the part of participants. Essentially, the trainers were required to present the *PETC* concepts, strategies and procedures in a vacuum with no client systems for the participants to prepare for, experience and learn from.

In an effort to overcome this insufficiency, the trainers encouraged the Cadre to look upon itself as a potential client system and apply the concepts and strategies to itself. At times, this was purposefully done by modifying the focus or emphasis of a particular technique so that the Cadre became the client system. This was particularly true in the April training session where problem identification and a skill needs assessment was performed with the Cadre as the target system. However, this strategy met with only moderate success. On occasion it was inappropriate to modify a particular technique to focus on the Cadre. More frequently, the strategy was insufficient because of the difficulties inherent when one tries to become a consultant to a group to which he or she is a member, and because this strategy required greater skill and expertise than the members commanded. Additionally, and possibly more importantly, this strategy of applying the learning to the Cadre often went against certain norms that restrained the group from becoming self-reflective and critical.

During the August training session the trainees recruited an artificial client system of teachers and teacher aids. Much of this training session was devoted to preparing for, conducting and evaluating a one-day workshop conducted with this artificial client system. In reaction to this experience, several participants commented upon the worth and value of conducting the live simulation. All in all, however, it must be said that the lack of a practicum experience and especially the limited practical experience of the participants, greatly reduced the impact of the training sequence.

The recommendation we derived from this experience is rather obvious. If consultants are planning to use the *PETC* systems with participants that have little experience with client systems, they should

carefully consider the consequences of this deficiency. If a concurrent practicum experience is not available to the participants, issues of relevancy will become paramount and every effort should be made to engage the participants in some sort of practicum experience.

PROBLEMS OF INTACT GROUPS

A special set of problems arose during this intervention that related to the use of the *PETC* systems to train an intact group. An intact group is defined as any group with a history of working together--a history that is of sufficient duration to result in the development of specific norms and procedures which affect the behavior of members. The Cadre constituted such a group. The problems that are associated with using the *PETC* systems to train intact groups are of two types.

The first type is related to the fact that the *PETC* materials and strategies represent far more than a mere package of training materials and techniques. They constitute a set of powerful intervention tools that can be used as resources to a consultant attempting to affect changes in an organization or group. The fact that the *PETC* systems were impacting the group and being used by the participants in more ways than just as a training sequence from which to learn became apparent early in the intervention. On several occasions during the intervention, information about the Cadre's internal problems and dynamics was generated by the *PETC* exercies and procedures. In April and again in July, the trainers used this data generating quality of the exercises to raise the participants' awareness of their own group dynamics and internal problems. Following two different exercises, the influence exercise in April and group agreements exercise in July, the discussion expanded to include some critical concerns and feelings that members were experiencing about the Cadre.

Throughout the intervention, training exercises and procedures would bring to light internal problems and surface interpersonal conflicts and concerns. Unfortunately, while internal problems would be surfaced, the press for continuing with the training sequence and the skill level of the Cadre members reduced the use of the data in problem solving and conflict resolution. Frequently, the trainers commented on the fact that the exercises had surfaced a particular problem or the group had been provided with some new data about an issue, but that the restraints of time and the press to continue with the training had, in effect, short-circuted the problem solving efforts of the group.

In some ways this problem was amplified by the "tightness" of the *PETC* systems and the sequential nature of the exercises and procedures. The *PETC* systems were developed to provide individuals with training in a particular set of concepts, skills and practices. They were not designed to generate data about groups and assist groups in identifying and solving their problems. However, when used as a training system with intact groups they do generate data about the group and they do identify group problems and issues. However, there are no "built-in" procedures in the systems that are intended to help a group solve the problems or deal with the internal issues that are identified. This step of dealing with the internal issues that are surfaced is left to the consultant or trainer using the *PETC* system.

The recommendation we derived from this first type of problem is that consultants using the *PETC* systems to train intact groups should expect the various exercises and procedures to generate information about the groups's internal problems and dynamics and they should prepare in some way to help a group deal with the internal issues that will inevitably arise.

The second type of problem associated with using the *PETC* systems to train intact groups related to the possible discrepancy between the norms and expectations of the group receiving training and the assumptions and expectations of a particular technique or procedure. The *PETC* systems were developed to be used with essentially "stranger groups"--groups comprised of individuals who have little interaction with one another outside the training experience. During many of the *PETC* exercises the individuals within the training group are expected to team together and use each other as resources. Participants are requested to critique each other's designs, give feedback to one another about consulting styles and procedures and generally learn from one another. As so designed, these exercises require the participants to share information and perceptions with each other in a fairly open, nondefensive manner. Problems arise in using the *PETC*'s exercises when discrepancies exist between the assumptions and requirements of a procedure and the norms of the group receiving training.

An example of this kind of problem occurred during the August training. Late on the first day of the training, the Cadre was engaged in an exercise that required members to share perceptions and opinions about each others' skills as a consultant. The exercise was designed to provide each participant with feedback about his or her strengths and weaknesses as a consultant. However, the risks of sharing this kind of information freely and frankly were apparently too great. Instead of completing the exercise, the Cadre members spent approximately two hours avoiding the task by discussing reasons why they could not accurately assess the strengths and weaknesses of each others' consulting selves. While there may have been other reasons for the abortion of this particular exercise, it exemplifies the problem one will encounter if the assumptions

and requirements of an exercise are incongruent with the norms of the training group. In fact, it was not until the trainers made some rather major modifications in the structure of the exercise that its intended objective was accomplished.

The recommendation we derive from this second type of problem is that if consultants use the *PETC* exercises and procedures with intact groups, care must be given to matching the requirements of a particular exercise with the norms of the training group. If a match does not exist, structural or procedural modifications may be required before the exercise will accomplish its intended purpose.

ORGANIZATIONAL ISSUES

The last two recommendations, when expanded, lead to a series of considerations that we became aware of in using the *PETC* systems to train and help establish a cadre of educational training consultants. Even though the *PETC* materials and strategies were designed to be an intact instructional system, they represent a powerful set of resources and tools that can be modified and adapted to meet the needs and requirements of an intact group. Further, if they are to be used as resources, they will require careful, informed modification if optimal impact is to result.

Any consultant who chooses to adapt the *PETC* systems is obliged to assume an organizational development stance and carefully assess the needs of the client system before proceeding with a particular set of exercises. This means that the consultant must not assume that "training in the *PETC* systems" is all that a group may require. In many instances, organizational issues of management and coordination may become paramount. In others, issues of decision making, problem

solving, goal setting, and evaluation may outweigh the need of the group to be trained in consultant skills and techniques. This is particularly true when the objective of the intervention is to assist with the establishment of an internal cadre of training consultants.

Throughout the intervention described in this report, the trainers were continuously torn between the Cadre's need for training (a need that was frequently and forcefully voiced by the members themselves) and the Cadre's need to address critical organizational issues. In the main, the trainers maintained the original intent of the intervention and provided the group with training in consultant skills and techniques. However, at this time it is our belief that more time should have been devoted to organizational issues and that had this been done the vitality and eventual success of the Cadre would have been enhanced. To some extent the verbalized needs of the group and the assumptions of the *PETC* systems combined to result in greater emphasis being given to training than might have been warranted. Had we been more careful to maintain an organizational development stance and continuously questioned the assumptions of the materials and strategies as well as the assumptions of the client system, a more powerful intervention might have been conducted.

The recommendation we derive from this aspect of the intervention is that if consultants are to use the *PETC* systems as resources to be modified and adapted, an OD stance should be assumed. This implies that the consultants should be experienced in organizational consultation, should be knowledgable in organization and group theory, and skilled in assessing and diagnosing the needs of a group and matching intervention techniques to these needs. In short, we recommend that the *PETC* materials and strategies--the concepts, procedures and methods contained within the

systems--should be systematically followed and applied during the process of modifying and adapting the systems. In other words, one must "use" the *PETC* systems when "using" the *PETC* systems.

APPENDIX A

Brief Descriptions of
Related Training Programs:

Research Utilizing Problem Solving (RUPS)
Interpersonal Communications (IPC)
Interpersonal Influence (INF)
Social Conflict and Negotiative Problem Solving

PURPOSES AND OBJECTIVES OF *RUPS*

The initials *RUPS* stand for *Research Utilizing Problem Solving* process. Some participants in the administrator's version feel that a more appropriate title would be team building and problem-solving processes. There are two purposes to the *RUPS* workshop. One is to try out the steps of the *RUPS* process as a way of working toward improvements in the school setting. The second is to try out some ways of increasing teamwork skills.

Innovations in education are emerging at a rapid pace. Experimentation and research are producing a vast amount of resources for improving the quality of education. New kinds of curriculum and instructional approaches are being developed. It is becoming increasingly feasible to provide teaching strategies that make use of a multitude of resources and guarantee learner outcomes. Teachers in the past spent most of their time instructing their pupils. New materials and techniques will provide much of this instructional function more efficiently. In the future, teachers will be freer to attend to the functions of problem identification, analysis and resource utilization. These functions will increase the availability of problem-solving processes and resources most relevant to the needs of teachers and learners at any moment. Opportunities to learn problem-solving processes and research utilization processes shall enable teachers to plan and manage learning experiences more effectively.

Research Utilizing Problem Solving provides teachers and administrators with competencies in:

1. Applying four guidelines criteria for writing a problem statement
2. Paraphrasing in interpersonal communications

In the simulation, the trainee will learn to use the *RUPS* model as he/she analyzes a problematic educational setting, selects data gathering instruments and processes the results of the data to rediagnose the problem and create a plan to solve it.

The basic learning group is a sextet in which teachers/administrators train each other using criteria provided in the materials. A workshop leader gives instructions from a manual guiding teacher/administrator trainees through the design. The workshop leader needs to be familiar with the materials and design, but does not need to be an expert in the *RUPS* process.

Workshop Participants

This workshop is designed for teachers/administrators. There can be added benefits for team problem solving when a minority of other roles are included in a workshop. Such roles have included building administrators/teachers, curriculum supervisors, teacher's aides, secretaries, custodians, cooks and students. Given the focus in this set of training materials, the majority of participants in a workshop should be teachers/administrators.

Main Sessions (Aug. 8-27)					
Time	Monday	Tuesday	Wednesday	Thursday	Friday
8:30 am to 12:00 noon	Subset I Subset II	Subset V Subset VI	Subset IX Subset X	Subset XII	Subset XIV End
1:15 pm to 5:00 pm	Subset III Subset IV	Subset VII Subset VIII	Subset XI (End at 4:00)	Subset XIII (End at 4:00)	
Followup Sessions (Sept. 15 and Oct. 20)					
2:30 pm to 5:45 pm			Subset XV		
2:30 pm to 5:30			Subset XVI		

Figure 1. A Typical *RUPS* Workshop Time Schedule.

10. Applying the concept of matching behavior with intentions in communicating

11. Identifying freeing and binding responses which affect openness of communication

12. Applying the circular process model of interpersonal relations to identifying behaviors in one's own style of communicating

13. Identifying the effects of roles on communications

14. Identifying the effects of norms on communications

15. Identifying the effects of one- and two-way communications

16. Identifying patterns of communication

17. Identifying the influence on one's personal style of communicating under pressure

18. Applying techniques of assessing one's knowledge and skills in interpersonal communication

19. Applying guidelines to creating self-improvement communication exercises

20. Developing interpersonal support for improving communication skills

Nature of the Workshop

The *Interpersonal Communications* system includes 20 units which are approximately 90 minutes each. These exercises are designed to be used in sequence and have a cumulative effect. Some of these exercises can be used out of context of this sequence, but, as noted later, there are those for which this is unwise. Some exercises depend on skills gained and data generated in previous exercises in the sequence.

Educators frequently are involved with communication behaviors focused on in these exercises. It is assumed they do not often give them much attention. These exercises bring them more clearly into awareness. Certain knowledge about communicating is made explicit.

Improving skills goes beyond becoming more clear about what is already known. Each exercise involves participants in practicing the

1. The participants need to be involved. It is best if they have volunteered to be included in the workshop. It is crucial that they have a correct understanding of what the workshop is about and the way it is conducted. It also is recommended that, whenever possible, teams or entire school buildings experience the training together. This can create norms for use of new skills which might not be applied if individuals returned and attempted them in settings where there was little or no support for use of the skills.

   The basic work group of the workshop design includes six members. It is important that the total group be a multiple of six. These work groups cannot be smaller than six. Some may have seven or eight people if absolutely necessary, but this is awkward and not advised. It is extremely important that all participants be present for <u>every</u> session of the workshop. The design is sequential and cumulative; many exercises depend on roles for trios and sextets. In many instances, participants train each other using criteria provided in the materials.

   One leader may work with a total group as large as 36. It is recommended, however, the total group not exceed 24. Especially the first time an individual is attempting the leader role, it is advisable that only 12 participants be included.

2. The materials are not intended to be self-explanatory. Thus, all new leaders should experience the workshop materials and design as a participant <u>before</u> attempting the leader role. Reports indicate that cotraining with a leader who has previously conducted the workshop is an additional benefit to the new leader.

3. Adequate time is needed to obtain and arrange all the necessary materials and equipment prior to the workshop. The leader must prepare charts in advance of each session as well as arrange materials to be distributed. Timing for such preparation must be carefully considered. It should be clear who is to be responsible for each such task.

4. An adequate time schedule for training must be specified and agreed to by all parties concerned. The design has been created using approximately 90-minute units to maximize flexibility for setting up alternative kinds of workshop schedules.

   The most consistently positive results have come from those workshops where the entire 20 units were conducted for 5 straight days, 4 units each day. However, if an entire school building staff is experiencing the training together, alternate designs may be successful: two sessions held one week apart, each consisting of two or two and one-half days, or one day per week for five weeks. These variations yield good results if skills are actively practiced between sessions and results of the practice shared at the beginning of each session. The

INTRODUCTION TO *INTERPERSONAL INFLUENCE*

The series of 20 exercises on *Interpersonal Influence* has three major dimensions:

1. Learning basic concepts about the process of interpersonal influence
2. Identifying one's characteristic styles of using and responding to interpersonal influence
3. Practicing basic skills of interpersonal influence

The first dimension provides the opportunity to become more knowledgeable about what is involved in the process of interpersonal influence. You will be able to discuss the ideas and derive implications for your own personal style of relationships.

The second dimension will produce an increased awareness of the consequences of your personal style of relating to others for the process of interpersonal influence. The outcomes should be a greater ability to be more explicit about what is desired and acceptable in your relationships involving influence.

The focus of the third dimension is a "do it" emphasis. The exercises include opportunities to identify behaviors described, to practice these behaviors, to assess their effects, to receive feedback from others in the group.

This series provides a setting in which issues of interpersonal influence are raised and dealt with. The knowledge and skills gained should enable the participants to be more aware of their own characteristic styles of behaving in the influence process. They will then be able to distinguish more clearly among interpersonal influence issues and other interpersonal interaction issues.

Session 9: Congruence of Intentions and Actions

Session 10: Influence of Nonverbal Behaviors

Session 11: The Helping Relationship

Session 12: Collecting Information About Ways I Influence

Session 13: Identifying My Characteristic Styles of Influencing

Session 14: Dual Accountability

Session 15: Collusive Behaviors

Session 16: Multiple Loyalties

Session 17: Game Playing

Session 18: Assessing Group Norms

Session 19: Pluralistic Ignorance

Session 20: Letting Myself Be Influenced

Objectives of *Interpersonal Influence*

Overall objectives of this series of exercises are as follows:

1. Ability to identify and explain the major ideas that describe the process of interpersonal influence as presented in the system

2. Capability for using guidelines provided to diagnose and analyze forces and effects of influence in selected interpersonal and group situations

3. Ability to identify and make judgments about your characteristic influence styles

4. Ability to identify extent and nature of your own need to influence

5. Capability for identifying ways in which principles learned and guidelines utilized in the workshop may be applied in settings other than the workshop

Each unit in the series has one or more objectives which contributes to the achievement of the overall objectives. These objectives will be presented with each unit.

SOCIAL CONFLICT AND NEGOTIATIVE PROBLEM SOLVING

Social Conflict and Negotiative Problem Solving is an instructional system designed for teachers, administrators and others to increase their ability to recognize and handle conflict due to differences of values and self-interest. It is intended to be a relatively structured, experience-based workshop designed to provide a variety of opportunities to explore situations of social conflict. The training is designed to provide conceptual awareness and experiential training in the following areas: social conflict, power, assertiveness, self-interests, interpersonal communication skills in conflict situations and "negotiative" problem solving skills.

The following paragraphs are taken from the pilot version of the instructional materials (Lohman and Wilson, 1974) to illustrate further the point of view of the developers and the meaning of the key concepts, "social conflict" and "negotiative problem solving."

> Social conflict is not neutral; it is not good; it is not bad. Conflict is both good and bad at the same time for human beings. That is, in any conflict situation one can find elements that we value as good, e.g., it may signal problems that need to be addressed, provide challenge, lead to more creative solutions, and help a group become cohesive. At the same time it is possible to find elements that we think of as "bad," e.g., it causes pain, it keeps people apart, results in violence. The training here is not designed to find ways to make conflict "good" or find ways to avoid those things which make conflict "bad." Rather, it provides opportunities to accept and understand conflict for what it is.
>
> Negotiative problem solving is defined as a process of dealing with social conflict, where the conflict is based on incompatible goals, values or interests. This process does not assume a consensus of ultimate goals, or that there is a single truth, or a one best-way, but

---

Lohman, John and G. Wilson. *Social Conflict and Negotiative Problem Solving.* Portland, Ore.: Northwest Regional Educational Laboratory, Improving Teaching Competencies Program, 1974.

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Objectives

1. Accepting conflict as a natural part of social reality

   A. Legitimation of own self-interests--regardless of value judgments (good/bad) about them

   B. Legitimation of others' self-interests--regardless of value judgments (good/bad) about them

   C. Accept feelings associated with conflict--anger, anxiety, withdrawal, competition, etc.

2. Increasing your ability to recognize self-interests in conflict situations

   A. Developing a usable personal definition of self-interest

   B. Identifying your own legitimate self-interests

   C. Identifying others' legitimate self-interests

   D. Observing the signs of emotional involvement and understanding the inevitability of emotions and feelings associated with these self-interests

3. Increasing your understanding of the phenomena of power

   A. Observing the forms and bases of power in a situation

   B. Developing a usable personal definition of the bases of power available to you in different situations

   C. Recognizing how our previous socialization affects our use and response to power

4. Observing and understanding the dynamics of conflict situations

   A. Observing styles of responding to conflict

   B. Recognizing styles in self and others

   C. Developing personal definitions of conflict styles

5. Understanding NPS model/process

   A. Collaborative/negotiative/competitive distinctions/ assumptions, values, developing personal definitions

   B. Using in practice situations steps/components

   C. Reviewing previous experience for implications

APPENDIX B

Selection Criteria for Cadre Members
Costs and Benefits of Training Programs
Costs and Benefits Cadre Intern Program
Application for Organizational Development Specialist Training Program

II. SELECTION CRITERIA FOR CADRE MEMBERSHIP (Revisions)

1. The expressed desire to be a member of the cadre.

2. Training and experience connected with the position as a member of the cadre of organizational specialists.

3. Other related background, training and experience such as former classes including Transactional Analysis, parent effectiveness training, Glasser groups, Magic Circles, etc., and books they may have read including I'm OK, You're OK, Organizational Development Handbook, any books on personal growth, any in-service training in group dynamics, social systems, social psychology of education, or social psychology of organizations.

4. That district and individuals have a minimum degree of commitment to cadre and post-cadre activities. Degree of commitment will be:

   a. Eighteen (18) day training program

   b. Give and get statements (See III)

5. Influence in the district.

6. The following balances would be needed in this group:

   - Sex

   - Role (administrator, superintendent, director, County Office of Education, counselor, school psychologist, nurse, teacher, teacher aide, classified)

   - Race, age and geographical location

7. Members of the cadre enjoy working in groups - "Team Membership."

How the selection process is seen and accepted by teachers and administrators is a critical variable in our eventual success.

District or area input into the selection of final candidates should be considered, as well as individual judgments by those in this group and those we ask for references.

(I recall we also considered bringing in some outside consultants who would make the final selection. We could use people like Bill Starling, head of the Eugene cadre. -- Jack)

Costs and Benefits
of Training Programs

District	Individual
Costs 1. Fifteen (15) days 2. Money 3. Three (3) days yearly - inservice	Costs 1. Time - 15-18 days 2. Voluntarily giving of skills 3. Voluntary time given according to group decisions (and implied energies) 4. Reordering of priorities and dealing with new and old priorities 5. Willingness to do more work 6. Models for alternative behavior
Benefits 1. Paid consultant help 2. Staff increases skills applicable to respective jobs 3. Potential consultant pool at low cost and readily available 4. Internal consultants qualitatively better --available --cheap --effective, motivated, acceptable to peers (credibility) --ongoing, intact group 5. Self-renewing systems (data on summer one-time workshop)	Benefits 1. Fifteen (15) days of paid training in summer workshop 2. New skills applicable to classroom, meetings and job related activities (new group membership) 3. Good feelings from group members

Costs and Benefits
Cadre Intern Program

District	Individual
Costs 1. Money for coordinator 2. Funds for inservice 3. Substitute salaries 4. Time away from basic role	**Costs** 1. Time away from basic roles (3 days in teams) 2. Time - donate 24 hours of volunteer time applying skills 3. Meeting (one per month, two hours each) self-renewal planning 4. Willingness to take risks
Benefits 1. More interdistrict cooperation 2. More status nationally and internationally 3. Improved communication inservice 4. Shared decision making internally ownership, participation - leads to --supportive-commitment --alternative solutions --valid information --participation 5. Sensitivity to include other groups - parents, boards in decision making 6. Effective use of "people" resources	**Benefits** 1. Status - strokes 2. Feeling of competency and success 3. Problems solved (more effective problem solving) 4. Enhance influence

APPLICATION FOR ORGANIZATIONAL DEVELOPMENT
SPECIALIST TRAINING PROGRAM

1. Name _____ Age _____
(Last) (First)

Home Address _____ Home Telephone _____
Street City Zip Code

School Address _____ School Telephone _____
Street City Zip Code

2. Present position _____
(If classroom teacher, designate grade level or subject taught).

3. Years of experience in present position _____

4. Years of experience in education (describe briefly) _____

_____

_____

5. How much experience have you had in the following type of activities? Check the activity, fill in dates and number of hours spent in that activity. Add others that are appropriate in each category:

A. Management

	Approximate Dates	No. of Hrs.
1. Program Planning and Budgeting Systems		
2. Management by Objectives		
3. System Analysis		
4. Performance Evaluation Review Techniques (PERT)		
5. Time Management		
6. Unit Budgeting		

	A. Management (Cont.)	Approximate Dates	No. of Hrs.
Other	7.		
	8.		
	9.		
	10.		

B. Human Relations

	1. Transactional Analysis		
	2. Erhard Seminar Training		
	3. Interpersonal Communication		
	4. Parent or Teacher Effectiveness Training		
	5. Group Problem Solving		
	6. Conflict Resolution		
Other	7.		
	8.		
	9.		
	10.		

C. Technical Competencies

	1. Consensus Decision Making		

C. Technical Competencies (cont.)

	Approximate Dates	No. of Hrs.
2. Management of Reading by Objectives (MRO)		
3. Systematic Learning in Math (SLIM)		
4. Inventory of Developmental Tasks (IDT)		
5. Cowboy SLIM		
6. Instructional Objectives Exchange (IOX)		
7. Fountain Valley Reading and Math		
8. Multi-age Grouping		
Other 9.		
10.		
11.		
12.		

6. In your role, how much do you think you influence your school or district on policy matters?

I am very influential 1 2 3 4 5 Not at all influential

7. Indicate how well you understand each of the following: (circle a number)

	No understanding				very well understood
Task vs. Process	1	2	3	4	5
Interpersonal Gap	1	2	3	4	5

7. (continued)

	No understanding				Very well Understood
Paraphrasing	1	2	3	4	5
Behavior Description	1	2	3	4	5
Description of Feeling	1	2	3	4	5
Perception Check	1	2	3	4	5
Systematic Problem Solving	1	2	3	4	5
Organizational Training Theory	1	2	3	4	5
Function of Communication Consultant	1	2	3	4	5
Diagnostic Methods	1	2	3	4	5
Consensus Decision Making	1	2	3	4	5
Classroom Application	1	2	3	4	5
NASA Simulations	1	2	3	4	5
Hollow Square	1	2	3	4	5
1-way, 2-way communication	1	2	3	4	5
5-square	1	2	3	4	5
Fishbowl	1	2	3	4	5
Blindfold Walk	1	2	3	4	5

8. If you were selected, what strengths would you bring to the team?

9. If you were selected what reservations or questions would you have as a team member?

10. How do other people see you?

11. Recommendations

Please list three people who are directly familiar with your work.

Reference:

Name	Position	Address	Telephone
1.			
2.			
3.			

Please send your completed APPLICATION to:

Attached are three REFERENCE FORMS for your use. Please have them submitted to:

Director
Special Services
County Office of Education
California 95060

_____DEADLINE FOR APPLICATIONS INCLUDING REFERENCES IS MARCH 31, 1975

APPENDIX C

Chart 1: Overview of April Training
Chart 2: Tracks of Training Focus
April Training Materials
May Training Materials
July Training Materials
August Training Materials

Chart 1

Overview of April Training

April 13	April 14	April 15	April 16
Introduction Review Contract Data Feedback Overview/ Assumptions Reactions Force Field Learning contract	Problem Identification Training Force Field	Prepare	Exercise #14
Introduction of Training Sequence Problem Analysis Program Training Initiate Needs Assessment (4 view of group)	Identify Skills Need Training Record Group Skill Needs △△○○○ Introduction to Preparing to Conduct STE	Exercise #4 Exercise #21	Business Meeting

Chart 2

Tracks of Training Focus

I.	To increase skills trainer capacity	Diagnose client group's problems, needs Select, sequence appropriate/relevant training activities Conduct workshops, training exercises Design/Plan training events, etc.
II.	To increase teamwork effectiveness to strengthen the cadre as an organization	Gain functional capacity, e.g., planning, problem solving, communicating, decision making, managing, etc., to enable the cadre to successfully achieve its goals
III.	To develop strategies	Achieve acceptance and legitimacy in the role of ETC with time and budget to offer services to tri-county providing functional capacity to systems, subsystems focusing on normative and structural changes as the trademark of OD work to determine content of ETC role in tri-county
IV.	To explore and practice aspects of a consulting model--part of the PETC program of NWREL	To acquire skills of applying a differential diagnostic matrix and a differential intervention matrix, guided by phases of planned change in providing assistance to client systems

Tentative Macro Design for 17½ days of Training and Consultation

April-May	July	August
Provide training to increase skill trainer capacity Provide consulting assistance to TRIOD in strategizing achievement of goals	Provide training to explore concepts about consulting and practice consultation skills Facilitate TRIOD's work toward goal achievement	Provide training to explore some central ideas about organizational development, practice skills, build repertoire of interventions, applying various methodologies

Catalogue and Description of Materials
Used by NWREL Trainers in Cadre Training--April Session

Step	Materials	Description
#8 - Introduce Training Sequence	PETC-I, Paper 2; Introduction to PETC-I: Skills Trainers Workshop, pp 1-2.	Paper 2 briefly describes the role of the skills trainer in the PETC-I workshop. It identifies the types of learning experiences the workshop presents in the context of the Do-Look-Learn approach. It also lists the four behavioral outcomes of the training.
#9 - Program Analysis Program	Group Process Skills, Exercise 18: "Personal Problem Analysis Program"	Exercise 18 presents a 20-step approach for the individual participant to systematically analyze a personal problem. The program has the participant describe a problem, identify feelings associated with the problem, study the dynamics of the problem situation and suggest behavioral changes for resolving the problem.
#10 - Initiate Needs Assessment	PETC-I, Session 2: Initiating Needs Assessment; Paper 4: "Dimensions Essential to Group Growth"	Paper 4 posits 9 dimensions of group growth: membership, influence, feelings, individual differences, productivity, roles, communications, goals, perception. For each dimension the paper poses questions about how the dimension is evidenced in a group, group problems relating to the dimension, and individual skills that may aid resolving problems concerning the dimension.
	PETC-I, Session 2, Paper 5: "Four View of my Group"	Using a series of concentric circles for each of the factors, cadre members pictorially described their organization according to the following factors: -major issues in your group -communication network -people of power and influence -your position in relation to others
	PETC-I, Session 3: Group Problem Identification; Paper 8: "Skills Needed by Members of Productive Groups"	Asking participants to keep in mind their behaviors in a preceeding trio activity, the paper lists 12 skills, e.g., listening and saying skills, feedback, awareness of own behavior, helping group maintenance, group diagnostic ability. The paper then presents a 9-point anchored rating scale for the participants to rate their behavior in the trio activity for each of the 12 skills.
	PETC-I, Session 3, Paper 5: Four Views of My Group	A second part of this paper lists the same 12 skills described in Paper 8 and has participants judge the adequacy of their skill use in the context of the 4 views of their group.

Step	Materials	Description
#11 Problem Identification	PETC-I, Session 3, Paper 9: "Four Guidelines for Writing a Problem Statement"	This paper discusses some of the difficulties in writing a concise problem statement, then provides as guidelines 4 questions that a problem statement should answer. Additional questions are posed as considerations for responding to the 4 guideline questions while writing a problem statement.
#12 Force Field	PETC-I, Session 4: Force Field Analysis and Data Utilization; Paper 11: "Force Field Diagnostic Technique" and Paper 12: "Force Field Analysis"	Using a hypothetical problem statement, these 2 papers take the participant step-by-step through the force field technique. It provides guidelines for the most productive use of this diagnostic tool and forms with which the participant can undertake a force field diagnosis to analyze their recently created problem statement.
#13 Identify Skill Needs	PETC-I, Session 4, Paper 13: "Skills I Need to Acquire"	Using as organizers the headings Problem Solving Skills, Interpersonal Communication Skills and Group Process Skills, Paper 13 presents an expanded list of 31 skills for the participants to use in conjunction with their force field analysis to identify the skills they believe they need to work productively on their problem.
#14 Recording Group Skill Needs	PETC-I, Session 6: Recording Group Skill Needs; Paper 16: "Procedures for Producing a Skill Needs Assessment"	Procedures Paper 16 provides step-by-step instructions for members of a group to share their identified skill needs and prioritize them for the group, discussing each skill to reach a group understanding of its meaning for them.
#16 Analysis, Selection and Planning to Conduct Skill Exercises	PETC-I, Session 7: Data Analysis and Selection of Exercises; Paper 19: "Guidelines for Selecting, Sequencing and Conducting Exercises	After a brief description of the varying roles and functions of a skills trainer, this lengthy paper undertakes a systematic breakdown of the issues and activities involved in the selecting, sequencing, modifying and conducting of a group process skills workshop. It provides critical questions and principles for the skills trainer to consider while moving through this S, S, M&C process. Paper 19 also includes a listing of several other sources of group process exercises, a sample exercise evaluation form and a data collection worksheet as additional tools.
	PETC-I, Session 7, Paper 20: "Catalog of Exercises"	Paper 20 identifies the 24 group process skills exercises used in the PETC-I system, charting the skills focus and dimensions-of-group-growth focus for each exercise. Nutshell description of each exercise is given which provides a statement of purpose and what the setting, time requirements and primary activity is for each exercise.

Step	Materials	Description
#16 (continued)	PETC-I, Session 7, Paper 21: "Exercise Selection Worksheet"	The worksheet has participants list the group problem areas and skill needs, conduct a force field analysis of group's readiness for process skill acquisition, then select and sequence 3 exercises for their group giving a rationale for their choices.
#18 - Debrief of April Training	PETC-II, Paper 20: "Personal Growth Inventory" (developed by Michael Blanchfield and Gordon Lippitt) and Paper 37: "Analyzing Team Effectiveness"	The inventory was used to have participants rate themselves on a number of important attitudes and behaviors and to project their future aspirations and goals about these elements of personal growth. The instrument makes use of a 10-point anchored rating scale for this self-evaluation activity. Paper 37 asks participants to use a 7-point anchored rating scale in evaluating their trio training team on 8 variables of team interaction. Both of these papers were intended to be completed individually and then brought back for group work during the May training session.

Materials Used by Cadre Members
in Own Group Training Practicum--April

Step	Materials	Description
#17 - Conducting Skills Exercises	PETC-I, GPS Exercise #4 "Diagnosing Group Dynamics"	Mixing whole group work sessions on a specific task with pair/trio meetings to study the effectiveness of the group sessions, this exercise examines group process by applying the tools of the problem-solving process. The exercise is also meant to facilitate openness and trust building and allows for a sharing of perceptions on the group's operating procedures.
	PETC-I, GPS Exericise #21 "Task and Maintenance Roles"	This exercise attempts to provide participants with an understanding about group roles that apply to task and to maintenance and of the problems of perceiving roles accurately and achieving concurrence about role behaviors. The principle activity is a role-play undertaken in a fish bowl setting.
	PETC-I, GPS Exercise #14 "Influencing and Being Influenced"	Participants engage in three rounds of role playing in which two members of each trio grouping act out given roles and the third member observes. The intent of the exercise is to provide the opportunity to become aware of some of the issues of influencing and being influenced.

Materials Used With TRIOD - May Sessions

Steps	Materials	Description
#2 - Review of Communication Skills	Newsprint Chart	Chart presentation of the definitions of paraphrasing, perception checking, behavior description and feelings description with a matrix depicting the interrelationships of these four skills.
#4 - Input About Criteria for Group Effectiveness	Newsprint Chart	Charts present concepts developed by Chris Argyris in his Intervention Theory and Method: A Behavioral Science View, it is a list of criteria for group and personal effectiveness using as organizers: -basic activities -basic conditions -basic behaviors
#6 - Introduce STP and Organize Data	Newsprint Chart	A newsprint presentation of Fred Fournies' Situation-Target-Proposal model for organizing information in a problem-solving situation.
#7 - Presentation or "Pinch Model"	PETC-III, Resource 20	This one-page paper is a diagram of the "pinch model" developed by Sherwood and Glidewell, which provides a planned renegotiation model for group maintenance.

May Pre-Session Questionnaire

Data Gathering in Preparation for
Strategizing for TRI-OD's Future

A. Information about TRI-OD from the perspective of your district

1. How influential, as a group, is CO-OP in your district?

2. How is CO-OP viewed in your district?

3. What is the status of TRI-OD in your district?

4. What kind of information about TRI-OD needs to be disseminated in your district?

B. Information about TRI-OD from your own perspective

1. What are the chances that TRI-OD will be approved and budgeted by CO-OP?

2. What kind of statement can you make about TRI-OD as a viable force in Tri-County?

3. What do you think would happen to TRI-OD if CO-OP failed to provide budget and/or time?

C. Information about your relationship to TRI-OD to be considered before strategizing for TRI-OD's future

1. What issues internal to TRI-OD do you believe need to be dealt with?

2. What issues of coordination, administration and authorization of TRI-OD do you think have to be resolved?

3. Assuming TRI-OD will secure sufficient time and budget allocated, how much time would you want to spend in TRI-OD and what kind of activities would be of interest to you?

4. If TRI-OD were faced with a decision of whether to continue without funds, would you be willing to put energy into its survival? If so, how much energy would you be willing to expend this way?

5. What do you really think TRI-OD's future is? What part do you really want to have in that future?

Materials Used by NWREL trainers in
TRIOD Training - July Session

Time	Materials	Description
10 days before start of July session	From PETC-II: Paper 9: Central Ideas for Consulting Part I: Introduction to Consulting Part II: Introduction to PETC-II Theoretical Models Paper 13: Using the matrices for Designing Interventions Paper 18: Dimensions of the Consultant's Role Paper 19: Dimensions of the Consultant's Job	The Central Ideas paper provides the theoretical foundations for the PETC-II training system. Part I describes the PETC-II system, its purposes and objectives and the assumptions on which the training design is based. It describes the distinctions between and the relationships of the three PETC training systems and provides a rationale for process consultation and planned change. Part II is an introduction to and explication of the three major tools of the PETC-II consultant: -Phases of the Consulting Relationship -Differential Diagnostic Matrix -Differential Intervention Matrix Paper 13 uses several hypothetical consulting situations to illustrate the interrelationship of the two matrices within the framework of the Phases of the Consulting Relationship. Paper 18 is a theory paper which makes the distinction between external and internal consulting roles and reviews the advantages and disadvantages of each role. Paper 19, an article written by Ronald Lippitt, gives a general definition of consultation. It then poses and discusses several questions which can be viewed by the consultant as problem-solving issues in the consulting relationship.
Step		
#3	PETC-II, Session 1: Step 2--Find the consultant exercise	Step 2--Two teams are formed, each team given an opportunity to create a consulting situation role--play and act it out while the other team observes. Observing team has to identify the consultant, describe the consulting behaviors he/she used, and decide if the consultant was in an external or internal role.
#5	Step 5--Introduction to the matrices and models of PETC-II	Step 5--Presentation on newsprint of the three PETC-II consulting tools: the phases of the consulting relationship, the differential diagnostic matrix and the differential intervention matrix.
#6	Step 6--Work with PETC-II Central Ideas Paper	Step 6--Reading and quartet discussion of Paper 9 (described above) using Paper 10 as a guide. Paper 10 is a series of 14 questions which focus on the key concepts of Paper 9.

Step	Materials	Description
Step 8	PETC-II, Session 2: Step 3-Create illustrations of applying the matrices	Step 3 had participants read Paper 13 (described above).
Step 9	PETC-II, Session 2: Step 4-Trio response to case Paper 14: Worksheet: Trio Response to the Case Paper 15: Cases for Response Paper 16: Diagnosing Client Issues	In Step 4, quartets were given one case study from Paper 15 to which to respond. The one-page case study provides information on the setting, the situation, the problem, the change needed and past activities of organizational consultant. Paper 14 poses several questions for quartet response to aid participants in analyzing and organizing the information in the case study, planning for further diagnosis and taking action. Paper 16 lists all the operational characteristics and functions from the differential diagnostic matrix. It identifies questions to be asked about each item and lists a series of characteristics of malfunction for each. The paper is included as a reference and resource in responding to the case study.
Step 10	PETC-II, Session 2: Step 5-Group discussion of case responses	Trios use Papers 9, 14 and 15 to share responses to the case study; identify and account for differences and give rationale for differing responses.
Step 11	PETC-II, Session 3: Step 2-Produce list of things a consultant does Paper 18: Dimensions of Consultant's Role Paper 19: Dimensions of Consultant's Job Step 3- Discuss lists Step 4- Inventory personal growth Paper 20: Personal Growth Inventory Step 5- Inventory skills needed by consultant Paper 21: Inventory of Some Things Consultants Do Step 7- Produce a Diagnostic Summary of Self as Consultant Paper 23: Diagnostic Summary Worksheet	Trios used Papers 18 and 19 (described above) to produce and discuss a list of consultant activities. Then Papers 20 (described in April materials section), 21 and 23 were used by individuals to take a look at their own growth needs as a consultant. Paper 21 lists the skills participants can acquire from NWREL's RUPS, IPC, IPI and PETC-I workshops and asks participants to evaluate themselves on which skills they need to acquire, they already have and they can help others gain. Paper 23 asks participants to use their work with Paper 21 to identify their highest priority skill needs and to examine their motivations to become consultants in light of their understanding of what consulting is.

Step	Materials	Description
Step 12	PETC-II, Session 4: Step 4-Team preparation to ask for help Paper 25: Inventory of What the Consultant Team Can Do Paper 26: Team Preparation to Ask for Help	Paper 25 has the trios pool the information from Paper 23 to create a team profile of skill proficiencies and skill needs. Paper 26 provides guidelines for the trios to use in preparing to ask for help from another trio.
Step 13	PETC-II, Session 4: Step 5-Teams plan to give help Paper 27: Planning Help for Another Team PETC-II, Session 5: Step 2-Three-team round of consultation Paper 30: Team Observer Guide	Paper 27 provides guidelines for team planning to give help to another team. Included in the guidelines are time parameters for helping activity, the format from Paper 13 for organizing information and action planning, a list of consultant goals for helping and a list of consultant behavioral do's and don'ts. Step 2 of Session 5 has one team giving help to a second team while a third team observes the interaction. Paper 30 asks three questions to have the observers focus on specific consultant behaviors.
Steps 15 & 16	Interpersonal Communication	The purpose of this session is to identify the importance of congruence among intentions, actions and effects and to look at own patterns of encoding. This is done by having the group react to and discuss several written descriptions of interpersonal interaction in light of a theory paper on the interpersonal gap.
	Interpersonal Influence, Session 3: The Circular Process in Interpersonal Influence	This exercise begins with a theory paper using a diagram and hypothetical situation to illustrate the concepts of the circular process. This is followed by a role play to depict the circular process in action.
	Interpersonal Communication, Session 14: Norms and Communication Interpersonal Influence, Session 18: Assessing Group Norms	This session provides a short theory paper defining and describing norms and their effect on communication. Participants consider and discuss a number of questions on norms operating in their own group to raise their awareness of the effect of norms on their group process. Further theoretical input on norms precedes a fishbowl activity to identify the norms operating during this four-day training period. Observers watch for evidence of norms in operation during this activity that are not being identified to increase awareness of the subtleties of normative behavior.

Step	Materials	Description
Steps 15 & 16 (continued)	PETC-I, GPS Exercise #1: Five Square	This exercise focuses on the definition and need for cooperation in solving group problems. The vehicle for learning is a puzzle-building activity that has guidelines set such that individuals must cooperate in order to achieve success.

Time	Materials	Description
First day-Morning	PETC-III, Procedures 17 with modifications: "Collecting Data from Myself and Others" Resource 112: Diagnosing Client Issues	Procedure 17 guides the participant through several paper-and-pencil worksheets in which the individual examines his/her attitude toward consulting, perception of self as consultant, skills as a consultant and perception of self as human system with functions and operational characteristics. Work is done on individual basis with some use of other individuals as resources. Paper 112, Diagnosing Client Issues, is the same as Paper 16 in PETC-II (described in the July materials section) and was used here to aid the diagnosis of self as human system.
First day-Afternoon	PETC-III, Procedure 18: "Giving and Receiving Feedback about Consulting Selves" Resource 118: Using the Johari Window Model to Increase Awareness of Self as Consultant	Procedure 18 has the participant complete a Johari Window based on the information collected from the Procedure 17 activities, receive written additions to the Johari Window from the other participants in the group, then participate in a total group feedback session to clarify these additions and revise their Johari Window accordingly. Resource 118 is a theory paper on the use and meaning of the Johari Window.
Second and Third Day all day	PETC-III, Procedure 24, revised: "Designing a One-Day Workshop" Resource 121: "Intervention Theory: The ODC as Theorist" Resource 123: "The Design Process is a Problem-Solving Journey" Resource 124: "The Universal Travel Agent"	Procedure 24 guided the participants through the design process: creation of several workshop designs by separate teams, whole group meeting to select a design for implementation, group meeting to select workshop trainers and workshop evaluators, and trainer staff planning of implementation and evaluation staff creation of an evaluation design and evaluation instruments. Resource 121 provided a theoretical approach to planning an intervention based on the work of Lee Bolman and was used by the participants as a theoretical tool in planning the several initial workshop designs. Resource 123 and 124 excerpts from The Universal Traveler by Don Koberg and Jim Bagnall provide another style of theoretical approach to designing interventions.
	Other Resources: -Interpersonal Communications Training System - Interpersonal Influence Training Systems - Research Utilizing Problem Solving	-Schmuck & Runkel's Handbook of Organization Development in Schools - Pfeiffer and Jones 5-volume Structured Experiences

Materials Used for TRIOD Training - August Session

Time	Materials	Description
First day-Morning	PETC-III, Procedures 17 with modifications: "Collecting Data from Myself and Others" Resource 112: Diagnosing Client Issues	Procedure 17 guides the participant through several paper-and-pencil worksheets in which the individual examines his/her attitude toward consulting, perception of self as consultant, skills as a consultant and perception of self as human system with functions and operational characteristics. Work is done on individual basis with some use of other individuals as resources. Paper 112, Diagnosing Client Issues, is the same as Paper 16 in PETC-II (described in the July materials section) and was used here to aid the diagnosis of self as human system.
First day-Afternoon	PETC-III, Procedure 18: "Giving and Receiving Feedback about Consulting Selves" Resource 118: Using the Johari Window Model to Increase Awareness of Self as Consultant	Procedure 18 has the participant complete a Johari Window based on the information collected from the Procedure 17 activities, receive written additions to the Johari Window from the other participants in the group, then participate in a total group feedback session to clarify these additions and revise their Johari Window accordingly. Resoufce 118 is a theory paper on the use and meaning of the Johari Window.
Second and Third Day all day	PETC-III, Procedure 24, revised: "Designing a One-Day Workshop" Resource 121: "Intervention Theory: The ODC as Theorist" Resource 123: "The Design Process is a Problem-Solving Journey" Resource 124: "The Universal Travel Agent"	Procedure 24 guided the participants through the design process: creation of several workshop designs by separate teams, whole group meeting to select a design for implementation, group meeting to select workshop trainers and workshop evaluators, and trainer staff planning of implementation and evaluation staff creation of an evaluation design and evaluation instruments. Resource 121 provided a theoretical approach to planning an intervention based on the work of Lee Bolman and was used by the participants as a theoretical tool in planning the several initial workshop designs. Resource 123 and 124 excerpts from The Universal Traveler by Don Koberg and Jim Bagnall provide another style of theoretical approach to designing interventions.
	Other Resources: -Interpersonal Communications Training System - Interpersonal Influence Training Systems - Research Utilizing Problem Solving	-Schmuck & Runkel's Handbook of Organization Development in Schools - Pfeiffer and Jones 5-volume Structured Experiences

APPENDIX D

Interview Schedule--June
Final Interview
Final Questionnaire
Self-Assessment Form: Consultant
Skills

INTERVIEW SCHEDULE
PETC CASE STUDY
JUNE INTERVIEW

INTRODUCTORY COMMENTS:

This interview should take about 30 to 40 minutes. We have several questions relating to the Cadre and the training provided by NWREL.

For accuracy and with your permission, we would like to record this interview and have it transcribed later. If at any time during the interview you prefer not to answer a question, simply say so and we will proceeed to the remaining questions.

Your answers will be kept confidential. No one outside the professinal staff at NWREL will see your individual responses. Once the interviewing is completed, all the responses will be tabulated and summarized and will appear in the final evaluation report of this project. At no time will individuals be identified with their responses.

The information we gain from this interview will inform us about your views of the cadre, permit us to adopt and tailor the training to the cadre and give us feedback on how you view the usefulness and effectiveness of the training provided during April and May.

Do you have any questions at this point?

If not, then let's begin.

Question 1: From your perspective, what are the major factors in the tri-county area contributing to the establishment of the Cadre as a group of organizational specialists?

Question 2: What are the major factors in the tri-county area hindering the establishment of the cadre as a group of organizational specialists?

Question 3: What are the major factors within the cadre contributing to the establishment of the cadre as a group of organizational specialists?

Question 4: What are the major factors within the Cadre contributing to the establishment of the Cadre as a group of organizational specialists?

Question 5: What are the most critical issues or problems facing the Cadre between now and September?

Question 6: What are the most critical issues facing the Cadre during the next year, from September to June 1977?

Question 7: Now, let's turn our attention to the April and May training sessions. On the last day of the May training, an agreement was reached about the role of Director, Coordinator, and functions of managing and administrating the Cadre's affairs. What is your understanding of the specifics of this agreement?

What are your thoughts and feelings concerning the agreement?

Question 8: Looking back on the 2½ days in May, what recommendations, comments, or observations do you have concerning the:

A. Session in general

B. Structure and design of the days' activities

C. Behavior and helpfulness of the consultants

Question 9: During April, we provided four days of training. Are there any recommendations, comments or observations that you would like to make about the:

A. Materials used during the session

B. The design of the training session

C. The style and behavior of the trainers

Question 10: Have the documentations and evaluation activities interferred with or disturbed the training?

Question 11: Has the training provided you with any new insights, understandings or skills? Has it changed you in any way, thus far?

Question 12: What are your hopes and expectations for the July and August training sessions? For you as a participant and for the Cadre?

Now, let me ask you some more personal questions.

Question 13: What were the main reasons for your joining the Cadre?

Question 14: How do you see the Cadre fitting into your career aspirations and professional development?

Question 15: In what ways do you hope to be involved in the Cadre in the future?

PETC CASE STUDY
CADRE INTERVENTION

FINAL INTERVIEW

INTRODUCTORY COMMENTS:

This interview session will probably take about 60 to 90 minutes. First, we have several questions relating the cadre, you as a consultant and the training provided by NWREL.

The information we gain from this session will inform us about your views of the NWREL training, your perceptions of critical outcomes and events, and your assessment of the impact of the intervention on you as an individual and the Cadre. We are not intending to evaluate you or the Cadre. Rather, we hope to evaluate the PETC instructional systems as they were modified for this intervention.

Your answers will be kept confidential. No one outside the professional staff at NWREL will see your responses. At no time will individuals be identified with their responses. If at any time you prefer not to answer a question, simply say so and we will proceed to the remaining questions.

Do you have any questions at this point? If not, then let's begin.

It is our opinion that some important changes have occurred both in the Cadre and in each individual member over the past several months. Many of these changes have been precipitated by the training materials and design, Ruth and Rene's interventions, factors external to the Cadre and dynamics within the group itself. We would like to ask you about some of the things we believe may have changed during the past few months. Many of these changes have been precipitated by the training materials and design, Ruth and Rene's interventions, factors external to the Cadre and dynamics within the group itself. We would like to ask you about some of the things we believe may have changed during the past few months. We are particularly interested in knowing: 1) if you also believe that a change occurred, 2) if you see the change in a positive or negative way, 3) what activities or events you believe were critical to bringing about the change and 4) how you see these changes affecting the future of the Cadre.

First, let's focus on major outcomes for the Cadre.

Major outcomes:

1. The clarification of the ways decisions are made in the TRIOD group.

2. The redefinition of roles in the CADRE specifically, Jack's being the director, Kathy the coordinator, and Shareen the consultant.

3. The changing or modification of the Cadre's agreements for example, the agreements about attendance and membership.

4. The establishment of a more realistic assessment of the group's skills, competencies and resources.

5. A clarification or redirection of the group's goals and objectives.

6. A new stability, organization and sense of mission that will sustain the Cadre throughout the coming year.

7. A strengthening of the Cadre's relationship with the educational agencies and districts it hopes to serve.

8. An enhanced ability to team together and effectively respond to a client's request for training or consultation.

9. An increased ability to deal with its own internal problems, conflicts and processes.

10. Other changes that have occurred in the TRIOD group.

Now let's look at changes that may have occurred in you as an individual. Again, we want to know if you believe a change has occurred. If you see the change as positive or negative, what events resulted in the change and how do you see the change affecting your membership in the Cadre or your future performance as an organization specialist.

11. An increase in your skills and abilities as a consultant—trainer. Specifically, what kinds of skills have improved?

    Probes:
    A. Diagnosing a client's needs
    B. Selecting skills exercises
    C. Sequencing and adapting skills exercises
    D. Conducting skills exercises
    E. Debriefing and evaluating skills exercises

12. An improvement in your interpersonal skills such as: communications, listening, giving and receiving feedback.

13. An increase in your ability to team with others and work collaboratively on a team.

14. A clarification or broadening of your understandings of OD and group process concepts and theory.

15. A reassessment of your commitment to the Cadre, your perceptions of your membership and role in the Cadre and the energy you will invest in making the Cadre a reality.

16. A reassessment of your goal of becoming an internal educational training consultant in the Tri-County area.

17. A reassessment of the need or potential impact of OD and group process training in the Tri-County area.

18. Other changes in your attitudes, knowledge or skills.

Finally, let us ask you a few questions about the 16½ days of training:

19. At the beginning of the intervention you expressed certain hopes or expectations you had for the training. Did the training meet your expectations. If so, how; if not, how did it miss them?

20. Do you have any suggestions or recommendations for us concerning:

    A. The use of the PETC materials?

    B. The ways in which the materials were modified and adapted?

    C. The focus or emphasis of the training?

Do you have any other comments, recommendations, or observations?

EVALUATION INSTRUMENT

FINAL QUESTIONNAIRE

PETC Training
September 1976

We have designed this instrument to assess to what degree participants have learned the major ideas and skills presented in the PETC materials. It is intended to evaluate the materials, NOT you. Your responses to this test will be completely confidential.

The instrument contains two sections. The first presents a hypothetical situation and asks you to respond to a series of questions about how you would intervene from the standpoint of a skills trainer. The second asks you to match certain key terms and concepts with their appropriate definitions or descriptions.

As an organizational specialist, how would you approach the following problem situation? Please indicate the response which you think best answers the question by either circling the number next to the response (as in questions 1, 11, 12 and 17) or marking the number for the correct response in the space provided next to the question (as in questions 2-10 and 13-16). Items 1-17 will be based on the following situation.

The Problem

Teachers of a new department in a new high school building have no knowledge of how to utilize a team approach to teaching.

The Setting

It is June 15. The high school in a community of 50,000 is moving into a new building on September 1. The school has been constructed in such a way as to take full advantage of the potential for more open teaching opportunities. It will be possible to engage in what is being termed as "interdisciplinary approach to teaching."

The Situation

One of the new departments in the school will be comprised of the old Social Studies and English departments. The title for this department will be "World Culture." The staff of this new department are all from the old units. They expect to work as a team, but are vague as to the implications of this task. At the same time, as a group they have given no evidence of inclination to work on this problem. One teacher, Ms. Williamson, is concerned about the lack of experience and training

of the staff to become a team and to plan for and manage a complete new approach to teaching and learning. Ms. Williamson thinks the staff needs training in team building, problem solving and communication skills. She shared concerns with the principal. The principal told Ms. williamson that he would call a skills trainer to see if some help could be provided.

The Staff Team

The seven staff members from the old Social Studies and English Departments will meet for a one-week workshop with the skills trainer. Ms. Williamson, a member of the Social Studies Department, has made the other staff members aware of the need for this workshop. This is her second year at this high school. She is the only teacher who has had experience in team teaching, as this was the method used in her previous high school.

Mr. Price, Ms. Loyd and Mr. Robinson comprise the school's Social Studies Department. Mr. Price is 24 years old, and this is his second year as a high school teacher. The exclusive focus of his course is European History; he strongly believes in the "tried and true" method of presenting history in chronological order, and views himself as having firm control of his classroom. Ms. Loyd teaches American History, and used a democratic approach to teaching. She feels that students learn best when they are presented overviews of key concepts upon which the "facts of history are hung." Mr. Robinson is the World Affairs teacher; his method of teaching is the discovery method and can best be described as "laissex faire." Many teachers have complained of Mr. Robinson's noisy classes; he had defended himself by saying, "When students become excited about something, they'll become noisy. And more than anything, I want my students to be excited about their work." Mr. Robinson is also a strong advocate for the inclusion of Anthropology, Sociology and Psychology into the curriculum.

The English Department is composed of Mr. Chaitovitch, Ms. Dean and Ms. Howard. Mr. Chaitovitch views himself as the grammarian of the Department. He feels grammer is an important but underrated aspect of English--long suffering from a history of poor, boring and unimaginative presentations. He spends most of his free time devising ways of making grammar exciting and interesting for the students. Ms. Dean is a classacist from the word go. Her students are required to read and report on books from her prescribed list of required reading. Ms. Dean feels that frequent and long essay tests are the best method for inspiring students to study hard and to guage the quality of their work. Ms. Howard, on the other hand, emphasizes modern literature. She has recently come under severe criticism for prescribing books and authors such as James Baldwin, Henry Miller and Kurt Vonnegut, which are unacceptable to certain elements in the community.

1. Choose which ONE of the following problem statements would be the BEST statement of the preceding problem situation.

    1. A diversity of educational philosophies and experiences have inhibited the development of a team approach to teaching. It will be necessary to provide similar experiences and develop a common philosophy for the team approach to proceed.

    2. The staff of the World Culture Department needs to become aware of the implications of being a teaching team. They need to identify and work on issues that will arise as a result of increased awareness of this educational approach. The staff appears to need skill training in order to be effective.

    3. The principal has been put in the position where he is responsible for organizing teaching teams for a new World History Department. The new department will include staffs from the current English and Social Studies Departments. He has had no experience with team teaching and does not know how to proceed. He feels that training in group process skills will help the teachers form a team.

    4. The staff teachers of the English and Social Studies Departments need training in team building, problem solving and communications skills in order to learn how to use a team approach to teaching. The staff will meet for a one-week workshop with the skills trainer.

As skills trainer for this group, you plan to do a force field analysis of the situation described above. For the forces listed below, Questions 5-13, mark the appropriate category for each force in the space provided.

1. Force for change

2. Force against change

3. Force that is neither for nor against change, or is not particularly relevant to the above situation

Do not make inferences beyond the data in the written account of the situation.

2. ____ The teachers are expected to work as a team.

3. ____ The teachers have strong, divergent opinions about how to teach.

4. ____ Ms. Williamson has had experience working on teaching teams.

5. ____ Professional jealousy exists among the teachers.

6. ____ The design of the building encourages the team approach.

7. ____ Team teaching is better for kids and is easier to use.

8. ____ There is an age lag within the faculty.

9. ____ There is a broad diversity of individual resources.

10. ____ The teachers are not committed to a new teaching style.

In his first meeting of the GPS group, one of the participants told the skills trainer, "In our group, nobody gives anyone a chance to finish what they are saying before somebody gets in on top of them and starts talking about something else."

11. Which ONE of the following statements would be the BEST way to paraphrase the preceding statement?

    1. You think we need more time to hear and understand people when they talk?

    2. Do you mean that you are so intent on what you want to say that you don't listen to who is speaking?

    3. Are you saying that you don't feel that anyone in this group is listening to each other?

    4. It sounds to me that interrruptions are a real roadblock to group productivity. This is an example of hindering behavior.

12. When assessing this group's skills needs, what would you, as the skills trainer, consider the most crucial question to answer?

    1. Is each member of the group aware of the skills needed as well as the skills being used?

    2. What are the expected outcomes and the present level of skills, and what are the skills that need to be developed?

    3. Are group members able to allow other members to express divergence without "laying their trip" on them?

    4. How do I get on board with the system and get them to start listening to each other?

Questions 16-19 describe four group exercises and their purpose. As skills trainer for the group described above, which of the exercises are appropriate and which are inappropriate for the needs indicated by the situation? For each question, mark in the space provided using the following:

    1. Exercise is appropriate to the group situation

2. Exercise is not appropriate to the group situation

13. ____	Leadership Patterns	-To observe and practice various leader behaviors and to assess their effects on group interaction -To identify helping and hindering leadership behaviors
14. ____	Speaking Precisely	-To sharpen listening and saying skills -To identify helping and hindering leadership behaviors
15. ____	Introduction to Group Roles	-To observe and identify task roles and maintenance roles needed for group achievement -To become self-analytical of contributions to group effectiveness
16. ____	Group Pressure Toward Uniformity	-To focus attention on ways groups function to obtain conformity -To identify ways in which group members influence -To study the behavior of individuals being pressured to conform -To sharpen awareness of group interaction

After completing the first three sessions, the group seems dissatisfied and uninterested. Group members make remarks such as: "Why are we doing these exercises anyway? Tell us what we're suppose to be learning. Do we have to have more of those meetings? How does this apply to our situation?"

The skills trainer responds by saying: "Don't worry, I know what I'm doing. I'm sure you'll understand this in time. I know what things are best for you." Or say, "What had the team done that would cause such a reaction?"

17. Choose one of the following statements that would be the most likely thing the skills trainer had done correctly.

    1. The skills trainer didn't clearly outline purpose(s). He/she did not allow the group sufficient part in the diagnostic process.

    2. The trainer should have directed the group to the "do-look-learn" system for the long-range goal of learning skills, not the short-range goal of solving the problem.

3. The skills trainer has made assumptions which hinder the group process; he generalized instead of just speaking for himself.

4. The skills trainer selected inappropriate skills exercises, exercises that missed the important issues of the team.

Below you will find a series of "matching items." The left-hand column contains a list of labels or terms that were used during the training. The right-hand column consists of a series of descriptions or phrases that can be matched with the terms in the left-hand column. In the space provided, please write the letter corresponding to each phrase that is associated with the term in the left-hand column. For example:

T 1. Pinch model — T. Demonstrates how group agreements must be renegotiated throughout the life of a group.

Each term has at least one correct phrase in the right-hand column. Not all phrases have corresponding terms and some phrases may be appropriate for more than one term.

_____18. Phases of the Consulting Relationship

_____19. Differential Diagnostic Matrix

_____20. Differential Intervention Matrix

_____21. Functions

_____22. Operational Characteristics

_____23. Processes for Designing Interventions

_____24. Possible Consultant Roles

_____25. Intervention Strategies

_____26. Intervention Techniques

_____27. Bolman's Model for Intervention

A. Enables the consultant to simplify, organize and describe the complexity of a situation in the client system.

B. Are the critical behaviors of a human system.

C. Are the more general, overall way in which a change effort is carried out.

D. Contains the dimensions: (1) processes of designing interventions (2) examples of intervention strategies and techniques and (3) possible consultant roles.

E. Can be used to solve the client system's problem(s) and enables the client to move toward establishing self-renewal.

F. Contains the dimensions of (1) levels of human systems, (2) functions, and (3) operational characteristics.

G. Contains the four elements: goals, assumptions, strategies and outcomes.

H. Guide the consultant in solving problems of how to construct or select intervention strategies and techniques.

I. Are the vital processes of a human system.

J. A conceptual tool which helps the consultant identify important dynamics in the consultant-client relationship.

K. Are the particular qualities of the way a human system goes about performing its work.

L. Can be used to identify critical problem areas while providing the consultant with some assurance that important areas are not being overlooked.

M. Are the specific ways in which an intervention strategy is implemented.

N. Focuses on the actions of the consultant.

O. Are the successive approximations a consultant uses during a sequence of problem solving sessions.

P. Developing a need for change; establishing a change relationship; diagnosis of client's problems; examination of alternative methods or goals; initiating actual change efforts; stabilizing of change...

Q. Provides a range of behaviors available to the consultants.

R. Enables the consultant to plan and implement a coherent intervention.

DIRECTIONS: For most of the questions that follow, please give us your honest appraisal by making a mark "X" in the space that best represents your opinion.

28. To what extent has this training fulfilled your expectations about what you personally might get out of it?

Has not come up to my expectations	/___/___/___/___/___/___/	Has exceeded my expectations
	1 2 3 4 5 6	

Think for a moment about the informational materials, practice exercises and methods used during the training. All in all, how would you rate them? (CHECK ONE BOX IN EACH LINE)

29.	Only restated or proved what I already know	/__/__/__/__/__/__/ 1 2 3 4 5 6	Offered new insights, new ways of viewing old problems
30.	Spoke to important issues, vital concerns	/__/__/__/__/__/__/ 6 5 4 3 2 1	Missed the important issues, vital concerns
31.	Hard to understand complex, full of "jargon"	/__/__/__/__/__/__/ 1 2 3 4 5 6	Clear, concise, understandable
32.	Little "how to" help for my actual group work	/__/__/__/__/__/__/ 1 2 3 4 5 6	Provided real "how to" help for my actual group work
33.	Session time was well used	/__/__/__/__/__/__/ 6 5 4 3 2 1	Time in the sessions was wasted
34.	Gained new insights about my style of consulting	/__/__/__/__/__/__/ 6 5 4 3 2 1	Learned nothing new about my style of consulting

On the items below, circle the number that best represents your opinion.

Please rate the content of the training: Skills, concepts, principles, and values for:

35. Appropriateness for your experience and understanding

Excellent	Good	Satisfactory	Barely Adequate	Unsatisfactory
5	4	3	2	1

36. Relevance for learning to be a skills trainer

Excellent	Good	Satisfactory	Barely Adequate	Unsatisfactory
5	4	3	2	1

37. Clarity of presentation and definition

Excellent	Good	Satisfactory	Barely Adequate	Unsatisfactory
5	4	3	2	1

38. Parsimony (little or no unimportant or not useful material)

Excellent	Good	Satisfactory	Barely Adequate	Unsatisfactory
5	4	3	2	1

39. Practical significance for successful skills training

Excellent	Good	Satisfactory	Barely Adequate	Unsatisfactory
5	4	3	2	1

Please rate the *methods/strategies/procedures* used during the training for:

40. Appropriateness for leaning to be a skills trainer

Excellent	Good	Satisfactory	Barely Adequate	Unsatisfactory
5	4	3	2	1

41. Practical usefulness in learning training skills

Excellent	Good	Satisfactory	Barely Adequate	Unsatisfactory
5	4	3	2	1

42. Efficient use of time

Excellent	Good	Satisfactory	Barely Adequate	Unsatisfactory
5	4	3	2	1

Self-Assessment Form:
Consultant Skills

Name: _____

Please use the following scale to rate your ability to do each of the following skills. Write the scale number that corresponds to your response in the space provided in the left-hand margin.

Ability Scale

0 = N.A., not able to rate
1 = Unqualified, lacking in skill
2 = Acquiring skill, needs improvement
3 = Basic competence, about average
4 = Very competent, above average
5 = Superior competence, expert

_____ 1. Know and use basic communication skills appropriately, e.g., paraphrasing, perception check, behavior description and giving and receiving feedback.

_____ 2. Show an understanding of the difference between constructed process training designs of GPS workshop and unstructured process training, and can affirm the value of each.

_____ 3. Understand diagnostic procedures and rationale.

_____ 4. Have a diagnostic orientation toward client needs and self needs, and have clarity about the difference between client needs and self needs.

_____ 5. Am capable of consistently using a client centered orientation and am able to state clearly a rationale for deviating from it and/or leveling with client about having no way to meet their needs.

_____ 6. Select skills training exercises.

_____ 7. Adapt skills training exercises.

_____ 8. Sequence skills training exercises.

_____ 9. Conduct skills training exercises.

10. Diagnosing individual and group process needs in the areas of:

_____ A. Goal identification
_____ B. Communication techniques
_____ C. Problem solving
_____ D. Decision making